The process for sending eDMs (excluding Alumni/Prospective Student)

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Background

The University currently communicates with different audience segments using several systems. Most notable segments are Alumni (Raiser's Edge) and Prospective Students (Oracle), the processes for which are outside the scope of this document.

Other audiences who are **not** prospective students or alumni currently receive bespoke-designed HTML emails sent either internally through Outlook, or through Campaign Monitor to contact lists uploaded at the time of sending. Some progress has been made towards creating standard UniSA templates, however different Divisions and Units handle eDMs differently, and the process needs clarification to reduce workload and create efficiencies.

The challenge

With the shift in focus from traditional above-the-line marketing to include a greater mix of below-the-line activities such as eDM, CMK is seeing a significant increase in the number of requests to develop eDMs. The purpose of these vary from short internal invitations which stakeholders just want to look professional, to complex newsletters being sent regularly to a list of subscribers.

Stakeholder expectation often indicates that CMK will develop these electronic communication pieces as part of their general responsibilities. The line between internal and external communication and where CMK needs to provide support is often blurred, meaning it can be difficult manage and prioritise those requests effectively.

As more communications are sent using HTML eDM templates, it creates demand for professional looking eDMs, and more internal stakeholders request similar-looking eDMs. This work is generally handled by the Digital team, as they have the skills required to create bespoke emails, as well as appropriate access to Campaign Monitor to build or send anything from a template.

Campaign Monitor itself has not been fully implemented to manage the type of activity it is currently being used for. The majority of traffic is being sent through a single client; the UniSA - email marketing Client. The result of this is a single list of supressed email addresses being used across a broad range of communications. For example, if a user unsubscribes from a research group's newsletter, they will also stop getting invitations to Symposia or the Enterprising Researchers talks, even if they have specifically expressed interest in receiving the invitation.

Whilst some headway has been made in developing easy-to-use templates within Campaign Monitor, they are still missing some of the more useful features of the platform, such as the subscription preferences, or ability to use custom data segments.

Current process

The current official process in place for sending eDMs (or Ezines) was outlined in SIP in 2012. The process is shown in detail in the Marketing Process Analysis document (page 54).

This process is still relatively accurate, and it can be seen that the Digital Officers play a large role in developing and sending these eDMs. Historically, this is because they were coded in HTML using SharePoint Designer or a similar HTML editor. This requirement for HTML familiarity put successful design and population of eDMs outside the reach of most non-specialist staff members.

It should be noted that the eDM platforms have changed since this process was outlined.

External communications through Campaign Monitor

Campaign Monitor is the email marketing, database and automation platform currently used by UniSA to design eDMs and to send to audiences outside of the University. When it was set up in March 2015, a large number of credits were purchased to fund ad hoc eDMs, but no formal processes were developed for the use of perpetual subscription lists or how billing would work for high-volume users.

Since this time, CMK have continued to send eDMs using the ad-hoc process, without capitalising on some of the additional features Campaign Monitor offers, and using the credits originally purchased by CMK to cover all eDMs sent in the initial set-up.

Clients and Users

The UniSA Campaign Monitor account is set up as an Agency account, meaning an unlimited number of Client accounts can be generated under it, and each Client can be allocated different templates, billing details, user groups etc. Each Client can also each maintain their own lists of unsubscribers. Individual Users can be granted access to Client accounts and have specific permissions applied.

Current Clients

There are currently eight active clients under the UniSA account. These Clients were created for various reasons as outlined below:

- College *(high volume users)*
- Hawke Centre *(high volume users, data protection)*
- Hawke EU *(high volume users)*
- MOD. *(high volume users, unique branding)*
- Student Experience *(design and test only)*
- UniSA - DM team email marketing *(campaigns)*
- UniSA - email marketing *(ad hoc, Division access)*

User permissions

Individual users can have permissions set to a very granular level. A summary of the permissions that can be customised is outlined below:

- Campaigns
  - Create campaigns
    - Send campaigns
    - Import their own designs
    - Build or import their own templates
    - Run design/spam tests
  - See reports
    - See subscriber details
- Automation (setting up automated eDM journeys)
- Transactional (triggered by events on our website – *not used*)
- Lists & Subscribers
  - Add new subscribers

Billing options

Campaign Monitor has two options for billing:

- **Monthly billing**
    - Pay per month per email address on each list
    - Good for frequent users
    - Must use credit card
- **Campaign billing**
    - Pay delivery fee per email address sent to, plus $5 (500 credit) delivery fee
    - Good for infrequent/one-off emails
    - Card or credits

With both options, the main Agency account can pay on the Clients' behalf, or the Client can be responsible for their own billing. If the main account pays on the Clients' behalf, it can re-bill the client at increased rates and generate a profit.

All UniSA Client accounts currently use the Campaign billing method, with pre-purchased credits having been apportioned to them from the original amount purchased by CMK when the UniSA - email marketing Client account was set up.

Email lists and subscription

Suppression lists

Suppression lists are lists of recipients who have opted out of all communication from a client account, as well as "hard bounced" emails. This functionality is required to conform to the Spam Act 2003. A side-effect of this is that any recipients who use this functionality on an eDM that comes from the commonly-used "UniSA - email marketing" client will no longer receive any eDMs sent from that account, despite the extremely varied nature of the eDMs sent from that Client.

This represents the major issue with using a single Client, and highlights the benefits of adding more specialised content-specific Clients moving forward.

Subscription lists

Subscription lists are perpetual lists of recipients that eDMs can be sent to. Campaign Monitor has the capacity for recipients to manage their subscriptions themselves, opting in and out of specific lists. These lists are currently not utilised by UniSA, with individual distribution lists uploaded for each eDM sent and deleted after reporting is finalised.

Subscriber preference centres

For recipients to self-manage their subscription details, Clients need to set up a subscriber preference centre. This functionality also allows recipients to update their details, such as their name, email address, and any other custom fields the Client sets up.

Preference centres can be customised to match UniSA or Client branding, and a dropdown allows recipients to modify preferences individually for each subscription lists the Client has set up. UniSA is not using subscriber preference centres on any existing Client accounts, and none of the existing templates have the required code to link to one.

Empowering recipients to update these subscription details can help reduce the number of recipients using the blanket "unsubscribe" feature and being placed on the suppression list. Creating thematically distinct Clients would also allow those who did wish to blanket unsubscribe from specific sub-sets of University communications to do so without missing out on the sub-sets they are interested in.

Internal communications through Outlook

Some eDMs are sent internally to unisa.edu.au email addresses or distribution lists through Microsoft Outlook. These are usually designed by the Digital Officers in HTML, then either cut-and-pasted from Internet Explorer into Outlook, or uploaded to Campaign Monitor and a test version forwarded on through Outlook.

Some Divisions have Outlook template files available for use, but their design is not uniform, and there is no standard documentation outlining their use. More work needs to be done to determine what internal Outlook templates are required to meet the needs of stakeholders.

Any standardised templates and associated documentation would need to be made easily accessible for internal users. The benefits of using the templates would also need to be effectively communicated to ensure University-wide take-up.

Benefits of Outlook for internal communications

There are several benefits to sending internal eDMs through Outlook rather than Campaign Monitor. These include:

Distribution lists

Internal distribution lists are already housed within the existing Outlook system and are maintained by ISTS to ensure they are up to date. Attempting to send to these lists through Campaign Monitor would require exporting the list and uploading it to Campaign Monitor every time an eDM is to be sent. This is cumbersome, time consuming, and adds extra potential for error.

Unsubscribe not required

Sending to internal recipients does not fall under the Spam Act 2003, and so no Unsubscribe information is required on these eDMs. Sending through Campaign Monitor is not possible without an unsubscribe code, which add the potential for internal email addresses to be added to supressed lists, thereby missing any future communications through the Client account.

No cost for distribution

Sending through Outlook does not use credits, unlike Campaign monitor which would effectively cost $5.00 to send plus additional funds dependant on the number of recipient addresses. CMK does already have a significant number of pre-purchased credits which attracted a volume discount when purchased in bulk, however these credits would be better used for external communications.

Less specialist training

The majority of UniSA employees should have a level of fluency with Microsoft Outlook required to use a template to develop and send an eDM. This will empower stakeholders to build their own eDMs, thereby streamlining the process and allowing quicker turnaround times whilst simultaneously allowing specialist resources to be employed on other priorities.

Negatives of Outlook

No data

Campaign Monitor offers robust data on open rates and clickthrough, going as far as to show which recipients have or have not opened the eDM or clicked a link. This data can be very useful when it comes to determining how well received a communication piece is, and can help improve the content of future communications. Whilst Outlook does have the option to add read receipts on emails, these are reliant on the recipient sending the receipt, and are not easily compiled into a usable form.

Some types of internal communication such as newsletters could benefit from clickthrough or open rate data, as it would inform how popular the newsletter and specific story types are amongst the audience. This would allow the people compiling the newsletter to concentrate on content that will have cut-through, or even decide the information is better communicated through other channels.

Difficult to design

Outlook is not the ideal platform in which to design a functional, aesthetically pleasing and robust eDM template. Designing a template which will stand up to use by the majority of internal stakeholders without specialist knowledge will be difficult, and will need to be supported by specific instructions for proper use.

Multiple templates will need to be designed to cover different types of communication, like invitations, newsletters, or simple informational pieces. The more complex these designs are, the more likely they are to break when being edited.

Recommendations

Using Campaign Monitor

Determining Clients

Once it has been determined that a stakeholder's eDMs will be sent through Campaign Monitor, their need for a Client account will be assessed based on the following factors:

- **Volume of eDMs:** Specific quantities must be agreed to, but sending at least once per quarter to at least 500 contacts would justify setting up a new client and training users.
- **Custom branding:** If a stakeholder requires non-standard templates which must be restricted to their use only, they should be set up as a separate Client.
- **Number of subscriber lists:** If a stakeholder requires a number of different perpetual subscriber lists, they should be set up as a separate Client.

Generic Clients

Stakeholders that do not qualify for their own Client account will distribute through one of UniSA's generic Clients. These generic Clients should be set up based on broad areas of interest across the whole University, and will allow users to unsubscribe from a specific category of eDMs without missing out on other types of information that they may still want to receive. The generic clients to be set initially up are:

- Research – For all research outcomes communications
- Community – For all community engagement events and activities
- Partner – For all industry engagement communications

Resourcing Clients and setting User permissions

Stakeholders who are set up with Client accounts will need to resource the process of creating and sending eDMs. The nominated resources will be set up as Users in Campaign Monitor with appropriate permissions. The stakeholder will need to inform CMK of any changes to Users for the Client account so that CMK can update as required.

Training Users

CMK will create training materials and hold regular/ad-hoc training sessions for the nominated Users, ensuring they are properly trained in how to use the Campaign Manager platform, as well as other relevant information such as Spam Act compliance etc.

Billing and budget

Stakeholders will be made aware of the fees involved in sending through Campaign Monitor prior to being set up as a Client.

Stakeholders with Client accounts will be responsible for determining their own payment method, and responsible for their own budgets regarding eDM distribution.

One-off or low-volume stakeholders will have their billing determined on a case by case basis.

CMK will need to determine how to use the remaining credits existing in the system.

Subscription lists

All stakeholders are responsible for maintaining their own subscription lists and complying with the Spam Act 2003. Stakeholders with a Client Account should utilise the Subscription Lists feature of Campaign Monitor to ensure subscription lists are accurately maintained.

Updated templates

Campaign monitor templates need to be updated to include appropriate code to link to the Clients' Subscription Preference Centres. With this in mind, it would also be prudent to ensure the templates are also compatible with other Campaign Monitor features such as the ability to use custom fields.

Ownership, management, and support of the platform

The ownership of the Campaign Monitor platform should rest with the CMK Digital team. A small group of administrators within this team would take responsibility for processing all requests for Client / User access, as well as overseeing generic Client activity such as ad-hoc deliveries. These people would also be responsible for offering support to Users and keeping training and support materials up to date. Members of the Campaigns team will retain access for situations where resources are low.

Using Outlook

Outlook templates

A suite of simple and robust Outlook template files should be developed and added to the [CMK Style Guide page](). Templates should cover the following eDM types:

- Text-based informational emails
- Event Invitations
- Story-based newsletters

Any requests for additional features will be assessed by CMK-Digital individually. Templates will be reviewed and improved regularly based on feedback.

These templates should be created to be easy for internal users to edit without specialist software like PhotoShop or an HTML editor. They should be accompanied by detailed instructions on how to format the text should they manage to break the template.

The newsletter template and user guide should encourage stakeholders to house the main content of the newsletter on one of the internal web platforms, either as webpage-based articles, or as a hosted PDF file for download.

When to use Outlook

Outlook templates should be used when:

- the audience is entirely internal contacts / distribution lists (Staff & Students),
- the audience is a personal contact list of the sender and not bound by the Spam Act 2003, or
- the stakeholder is managing their own database of subscribers (where unsubscribes are handled via reply email).

General recommendations

Uniformity of templates

As outlined above, there is a requirement for updated Campaign Monitor templates, as well as newly developed ones for Outlook. If new templates are being developed, they would need to be designed to be visually consistent across both Campaign Monitor and Outlook to ensure stakeholders get a consistent look regardless of the platform used. As Outlook is the more difficult platform to develop for, the eventual design should take its cue from what is possible there.

A simple, clean design with little to no images will allow easily used Outlook Templates, and can easily be replicated in Campaign Monitor. Simple templates will also reduce compatibility issues across different mail clients.

Training resources

Campaign Monitor and Outlook templates will both require effective training materials to be developed. These materials should be developed by the agreed process and platform owner.

Materials developed would include user guides and appropriate training sessions or other online resources such as video tutorials and a wiki.

Suggested process

A process should be agreed upon for handling EDM requests. This process would be designed to determine which platform should be used, as well as who would be responsible for developing and sending the EDM. For the full suggested process, please see *Appendix 1*.

eDM user categories

Taking into account the current systems and the recommendations above, user categories have been determined which are based on specific characteristics that help determine the best platform through which to send the required eDM.

These user categories are outlined in the table below.

	Outlook	UniSA Campaign Monitor		
		High volume	Ad-hoc UniSA	Ad-hoc Custom
Audience	Internal*	External	External	External
Frequency	Any	Regular	One off	One off
Branding	Standard UniSA	Any	Standard UniSA	Custom
Budget	Not required	Required	Not required	Required
Created by	eDM owner	eDM owner	Digital	3rd party supplier^
Sent by	eDM owner	eDM owner	Digital	Digital
CM Client	N/A	Custom Client°	Generic Client	Generic Client

Or limited external or mixed audiences.
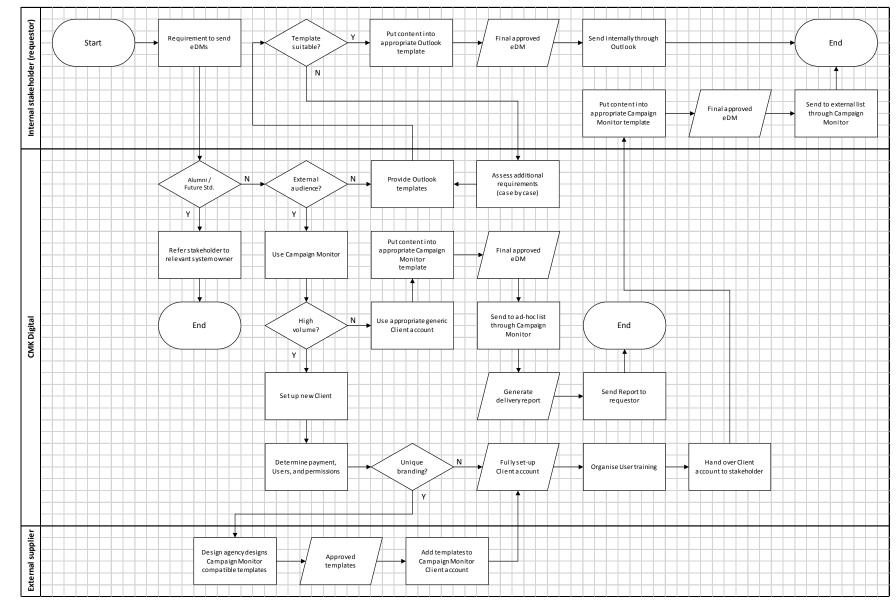*^ CMK to supply recommended supplier list on request*
° Set up by CMK as required

Requirements and responsibilities

Once the correct user category has been determined, stakeholders and CMK must clearly understand the requirements and responsibilities for sending eDMs through the chosen platform.

These requirements and responsibilities are outlined in the table below.

User category	Stakeholder requirements	CMK support
Outlook - Internal or minor external communications	Build and send in provided template Manage any responses or unsubscribes	Provide Outlook templates and instructions for use Collate feedback on template deficiencies Assess and respond to requests for non-standard templates.
Campaign Monitor - High volume	Need to be sending over 12 eDMs per year to qualify Provide a dedicated resource in stakeholder team to own the Client account Data / subscription list management Agree to budget for account and set-up costs Agree use of existing templates or fund external support from 3rd party supplier for custom designs	Set up of new Client accounts Initial training of new Users
Campaign Monitor - Ad-hoc UniSA Branded	Planned in advance and agreed by all partners (at least 5 weeks' notice) Content provided by stakeholder Distribution lists provided and managed by stakeholder	Support building in standard templates, testing and sending through Campaign Monitor Report on supressed / bounced addresses to assist stakeholder management of data lists
Campaign Monitor - Ad-hoc Custom Branded	Planned in advance and agreed by all partners (at least 8 weeks' notice) Stakeholder funds 3rd party developer to produce custom HTML eDM Distribution lists provided and managed by stakeholder	Support testing and sending through Campaign Monitor Report on supressed / bounced addresses to assist stakeholder management of data lists

Appendix 1 – Process for eDM requests