Leads360 Email Sending and Spam Compliance Best Practices

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Email can be a powerful sales tool and should be leveraged to dramatically improve your lead conversion and overall ROI. However, being effective at sending and delivering email requires a disciplined approach and rigorous implementation of email best practices.

Leads360 has developed this document to help our clients understand the how to use email to gain exponential value from our lead management platform. Furthermore, this document will provide clear guidelines to maximize email deliverability and effectiveness.

Step 1: Understanding Email Marketing vs. Lead Management

First and foremost it is important to understand the difference between email marketing and lead management.

Email Marketing: Is a form of direct marketing which uses electronic mail as a means of communicating to an audience usually for the purpose of enhancing the relationship of a merchant with its current or previous customers and to encourage customer loyalty and repeat business, or sending e-mails with the purpose of acquiring new customers or convincing current customers to purchase something immediately.

Lead Management: Is a term used in general business practice to describe methodologies, systems, and practices designed facilitate a business's connection between its outgoing consumer advertising and the responses to that advertising. The general principles of lead management create an ordered structure for managing volumes of business inquiries.

In short, the key distinction as it relates to our products is that email marketing is for generating interest and lead management is for qualifying and converting inquiries.

Leads360 is not an email marketing solution. We do not permit or encourage you to use Leads360 as an email marketing platform. If you want to generate leads using email marketing we encourage you to use a solution designed for that purpose. In fact, we use a company called Newsberry – www.newsberry.com to send our own marketing campaigns.

Step 2: Clarifying the Use of Email within Leads360

There are typically two stages where email is used within Leads360 and for a few different purposes:

Stage 1: Sales Cycle – The sales cycle typically occurs during the first 90 days after a lead is generated. During this period email is used to make initial contact, facilitate follow-up communications and keep the prospect engaged while efforts to qualify and convert the lead take place. Email uses in this stage are:

1) *Notifications to Prospects* –Sending an introductory email to new leads as quickly as possible. For most clients this is immediately upon receiving a new lead (i.e. thank you for submitting your inquiry, we will contact you soon)
2) *Follow-up with Prospects* – Sending emails at different stages of the sales cycle to update or notify them relative to where they are in the sales cycle (i.e. your loan is being processed or please complete these documents).
3) *Re-engage* Prospects – Sending emails to re-engage prospects who have lost interest or have fallen out of the pipeline (i.e. I haven't heard back from you or we seem to have lost touch).
4) *Notifications to Users* – Sending emails to internal users of the Leads360 platform to notify them of new leads or sales activity needed (i.e. you have a new lead or you haven't contacted this lead in 10 days)

Stage 2: Nurturing – The nurture period typically begins after a lead is 90 days old or when a prospect cannot be converted during the sales cycle. Such leads include those that could never be contacted, are qualified but aren't ready to buy or aren't qualified today, but generally are a fit for your product or service.

1) *Drip to Prospects* – Sending scheduled emails with valuable information to create regular touches with prospects. This could be monthly or at other intervals depending on the content. The objective is to stay connected with the prospect until they are ready to re-engage (i.e. we have some research we thought you might be interested in or hope things are well, we are available if you have any questions).
2) *Triggers to Prospects* – Sending emails based on changes or events that occur which would make the prospect likely to re-engage (i.e. market rates have dropped, you might be able to refinance or it's been 12 months since we did business, we have a special offer for you).
3) *Triggers to Users* – Sending emails to users to remind them to check-in with a prospect or because there is a new product offering (i.e. this prospect hasn't been contacted in 3 months, you should check-in with them or there are lower rates, you should contact this prospect again).

Leads360's email system is designed to automate the sending of the emails described above. It is designed to more efficiently manage the stages of a sales cycle after a lead has been generated.

Step 3: Building Your Email Campaigns

Leads360 has invested significant resources to develop emails campaigns that reach and engage prospects. We have included these emails as well as all the corresponding sending rules in our best practices templates for Mortgage, Insurance, Debt, and Loan Modification. Clients using our Small Business platform are permitted to modify the text of these emails but not add additional ones. Our Enterprise clients may modify, add or delete email campaigns as desired. However, with all of our clients we require that you follow the following guidelines when developing content and sending rules.

Content Formatting – Should you use HTML or plain-text emails? Leads360 offers both HTML and plain-text formatting when creating or editing an email. In general, plain-text has the highest delivery rates but HTML permits better formatting and is the only way to track "opens". We recommend using HTML in some cases and plain-text in others. Here is our best practices recommendation based on the email types listed in section 2:

- *Notifications to Prospects* – Use HTML with no images and minimal formatting
- *Follow-up with Prospects* – Use plain-text only
- *Re-engage Prospects* – Use HTML with no images and minimal formatting
- *Notifications to Users* – Use plain-text only
- *Drip to Prospects* – Use HTML with no images and minimal formatting
- *Triggers to Prospects* – Use HTML with no images and minimal formatting
- *Triggers to Users* – Use plain-text only

Content Guidelines – Since Leads360 is never to be used for email marketing, using a design heavy HTML email is not recommended. In general keep it simple. Keeping deliverability high and spam complaints low is more important than any cool design you can create. If you do use HTML follow these guidelines:

- *Set Width to Maximum of 600 Pixels* – Most email clients cannot display wider than this
- *Use Simple Layouts and Tables* – Many email clients have difficulty with complex styles and embedded CSS links
- *Limit or Do Not Use Images* – Using images increases chance of being flagged for spam and most email browsers don't show images by default
- *Include Company Address* – This is a requirement of the CAN-SPAM act and will cause a higher spam rating by most ISP's
- *Use Clear and Straightforward Subjects* – Most people will delete or flag as spam emails with gimmicky subject lines

For more detail about creating HTML emails, view this email best practices guide provided by MailChimp.com.

If you have any questions about Leads360's policies regarding email sending or need help configuring your system to ensure optimal deliverability, please contact us at: 310-410-9987 or at support@leads360.com.