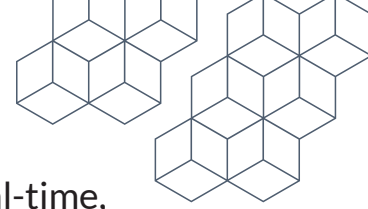


How-to-Guide

How to Optimize Your EPC for Adestra with Pivot

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 preferences are written back to Adestra as fields. Your epc fields will be prefixed with “epc”.

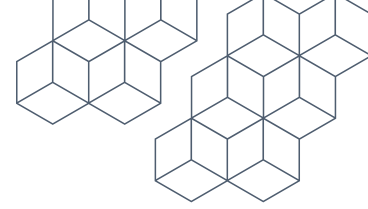
Important note for initial set-up: To have your preferences populated into lists, you’ll use your query builder to create the query on the AMS side. The sync will pick up those queries as lists from the AMS on the next sync run and those lists will appear in Adestra and continue to be updated every time the sync is run.

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

The image shows a screenshot of the HighRoad Solution Email Preference Center. The form is titled "Email Preference Center" and is set against a dark blue background. It contains several sections with checkboxes for selecting preferences:

- 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 field value for ‘epc_shopping_cart’ will be set to ‘True’ as in yes this contact is opted into Shopping Cart emails from HighRoad Solutions. On the next sync run the inclusion view list in your destination tool will increase by one contact to account for the newly opted in contact. In the opposite scenario, when a contact opts out of ‘Shopping Cart’ emails, their ‘epc_shopping_cart’ field value becomes ‘False’ as in this contact is not opted in to receive these emails and the exclusion view list in your tool for that preference reduces by one contact.



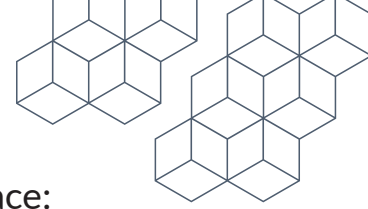
Example contact fields names as they appear in your core table:

Field Name	Data Type
imis_id	Text
first_name	Text
last_name	Text
company	Text
member_type	Text
member_category	Text
member_status	Text
informal_name	Text
paid_thru_date	Date of birth
chapter	Text
company_link_id_co_id	Text
member_welcome_since	Date of birth
job_function	Text
epc_in_person_events	Text
epc_conferences	Text
epc_chapter_events	Text
epc_member_news	Text
epc_awards	Text
epc_governance	Text

The next step — a step that is often missed — is adding all of your 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 with a Pivot. As a refresher, an EPC with Pivot is an EPC that works for known and unknown contacts (contacts in the AMS and contacts only in Adestra).

An EPC with a Pivot is divided into five different categories:







Example of your Adestra Only Opt-In & Opt-Out lists in your workspace:



ID	Name	Type	Count	Core Table	Owner
44	EPC Only Unsubscribe: Public Affairs Advocacy	Regular	0	IAAPA	IAAPA Integration
43	EPC Only Subscribe: Public Affairs Advocacy	Regular	2	IAAPA	IAAPA Integration
42	EPC Only Unsubscribe: News Funworld Magazine	Regular	0	IAAPA	IAAPA Integration
41	EPC Only Subscribe: News Funworld Magazine	Regular	1	IAAPA	IAAPA Integration
40	EPC Only Unsubscribe: News IAAPA News Hub	Regular	0	IAAPA	IAAPA Integration
39	EPC Only Subscribe: News IAAPA News Hub	Regular	1	IAAPA	IAAPA Integration
38	EPC Only Unsubscribe: News IAAPA Daily	Regular	0	IAAPA	IAAPA Integration
37	EPC Only Subscribe: News IAAPA Daily	Regular	1	IAAPA	IAAPA Integration
36	EPC Only Unsubscribe: Education IAAPA Certification	Regular	1	IAAPA	IAAPA Integration
35	EPC Only Subscribe: Education IAAPA Certification	Regular	0	IAAPA	IAAPA Integration

An example combination of inclusion and exclusion lists for a hypothetical Certification promotional email for an organization honoring their preferences with an EPC with a Pivot would look like the following:

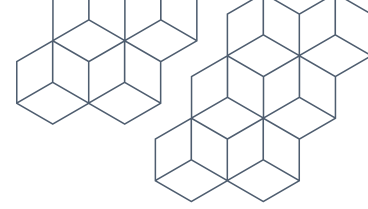
Inclusion lists:

-  All members
-  All former members

Exclusion lists:

-  Certification Exclusions (List coming over from AMS)
-  EPC Only UnSubscribe: Certification (List of contacts in Adestra only)





Global Opt-out

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



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
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- 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

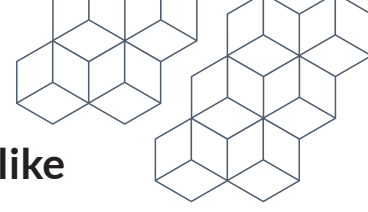
When it comes to your global opt-outs (otherwise known as your Global Unsubscribes), there are two ways to handle this in Adestra:

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

With a Global Opt-Out Sync add on feature, in almost all cases, you won't need to do anything additional to recognize your global opt-outs.

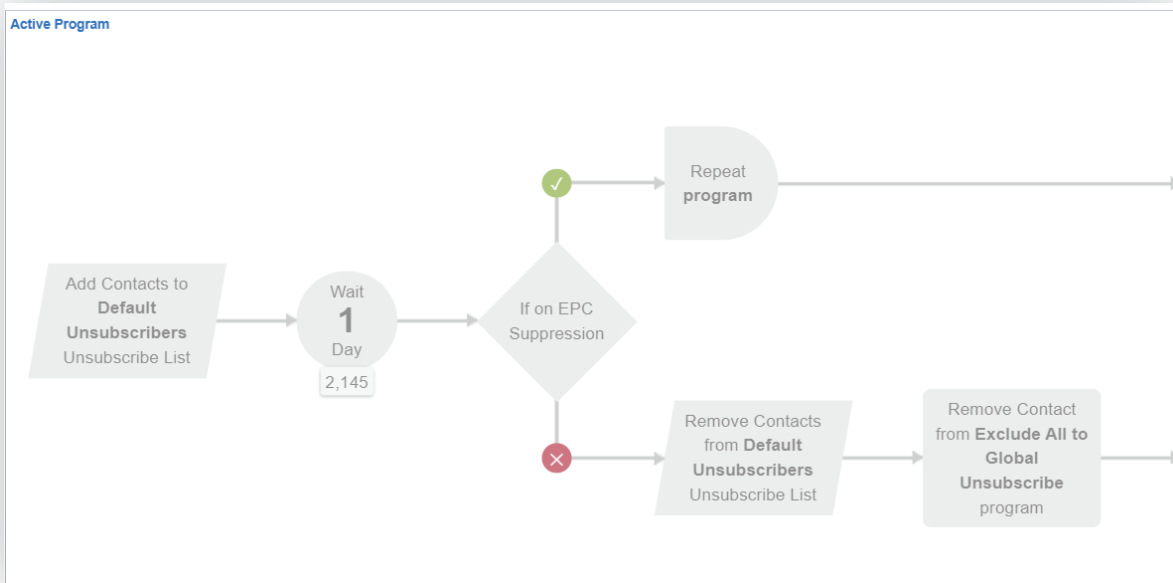
With the Global Unsub List, this won't be set-up automatically. You'll need to account for the Global Unsubscribe exclusion list. One way we account for your Global Opt Out Exclusion List view is by setting up an automation in Adestra that can allow you to handle all Global Opt Outs on the Preset configuration. As part of onboarding, HighRoad will help you set this up. As part of your ongoing Standard Operating Procedures (SOPs), you'll want to incorporate the following a few mandatory tasks.

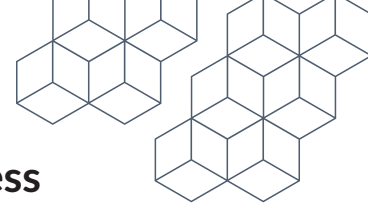




What the global unsubscribe automation workflow will look like in your account:

In this diagram, we're taking anyone that is on your view for global unsubscribes and adding them to a global unsubscribe list in adestra that you manage through your presets. Then, we're waiting a day and checking for anyone that is added/removed/still on the view for global unsubscribes and either keeping them on the unsubscribe list or removing them so they can start receiving emails again.





What your preset will look like where you will click to suppress the global unsubscribes:


In this image of unsubscribe handling on an Adestra preset, we're seeing two things happening:

1. We're selecting the Global Unsubscribe list as the Unsubscribe list to write email client unsubscribes. When someone doesn't click to the EPC page and they tell their email client (i.e. Outlook, Gmail) they want to unsubscribe, those records are stored on this list as shown in the configuration.
2. We're also selecting the Global Unsubscribe list as the suppression list so that emails going out using this preset configuration will suppress either email client unsubscribes or EPC global unsubscribes (as configured by the automation pictured above).

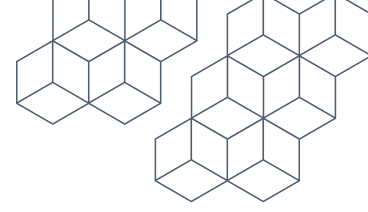
The screenshot shows a configuration panel with the following elements:

- Unsubscribe list:** A dropdown menu with "Global Unsubscribers" selected.
- Suppress list preset:** A dropdown menu with "Default Value" selected.
- Unsubscribe lists to use for suppression in addition to the selected unsubscribe list. Note that the selected unsubscribe list will automatically be suppressed regardless of whether it's selected or not.**
- Suppression lists:** A list of checkboxes:
 - Global Unsubscribers
 - Pause Subscriptions (7, 14, 30 Days)

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 for contacts that are in the AMS. All of the boxes that aren't checked by a contact are added as separate Exclusion Lists.

Checked boxes are category preference opt-ins

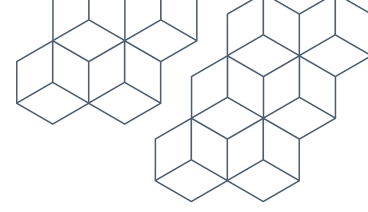
HighRoad Solution
Email Preference Center

- HighRoad Updates**
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- 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 (that are brought over as queries from the AMS).

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 two crucial steps when building your emails and lists as noted on page 9.



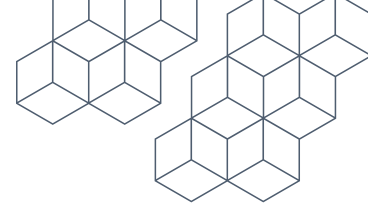


Preference Category Opt-Outs With Pivot

In another scenario, we'll look at an example of Joe: a contact that is not in the AMS. He is a net-new contact that only exists in Adestra. Joe visits HighRoad's Email Preference Center. He 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, Joe gets added to Adestra Only Opt-Out 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 Adestra Only Opt-Out lists into your distribution. You'll need to manage the process of honoring Joe's preferences, including topics he doesn't want to hear about. You do so based on two crucial steps when building your emails and lists as described on page 9.





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 your 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 both the Exclusion Lists (query from AMS) and the Adestra Only Opt-Out lists for each of the categories:

- 📦 Adestra Exclusion List (AMS) & EPC Only Unsubscribe List (Adestra)
- 📦 Webinars Exclusion List (AMS) & EPC Only Unsubscribe List (Adestra)
- 📦 Shopping Cart Exclusion List (AMS) & EPC Only Unsubscribe List (Adestra)
- 📦 Goal Setting & Tracking List (AMS) & EPC Only Unsubscribe List (Adestra)
- 📦 Member Engagement Exclusion List (AMS) & EPC Only Unsubscribe List (Adestra)
- 📦 Email Automation Exclusion List (AMS) & EPC Only Unsubscribe List (Adestra)





Example of a dynamic list using email opt-outs as exclusion lists from both the preferences coming in from the AMS and the preferences that are stored in Aestra only as part of the EPC Pivot functionality. This email is going out to all persons that do not want to receive virtual event communications.

ADD INCLUDE LISTS

ID	Name	Count
<input type="checkbox"/>	61 imis: All Customers	18,139

Exclude Lists

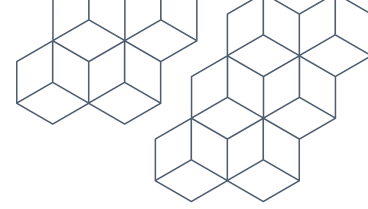
ADD EXCLUDE LISTS

ID	Name	Count
<input type="checkbox"/>	111 iMIS iQA: Opt Out - Virtual Events	425
<input type="checkbox"/>	29 EPC Only Subscribe: Expos Virtual Events	1

RoadWork Resources

- [!\[\]\(aca6fcc8bd95e8255b9ea1b1d08ef300_img.jpg\) How to Create an Email Step-by-Step Guide](#)
- [!\[\]\(0083087c61cec498ac803a4aec5bb1bd_img.jpg\) How to Create an Email Step-by-Step Instructions](#)
- [!\[\]\(2e94242fda9f31152eb2b29146bfce46_img.jpg\) 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

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- New tools & technologies

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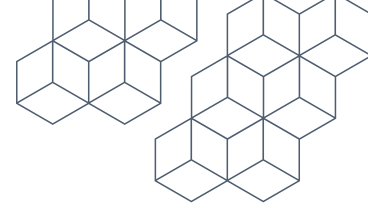
- Data management
- Email automation
- Marketing automation
- Digital marketing
- Technology adoption

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.

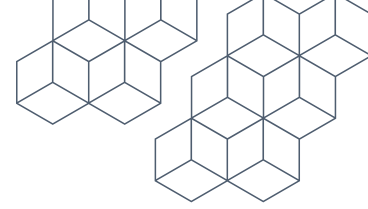




The minute that our client—Tom in this instance—tells us that he wants to hear about these topics, the onus is on us to build these individual Inclusion Lists into our distribution. We manage the process of honoring Tom’s preferences by incorporating the following steps when building your emails and 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 (AMS) & EPC Only Subscribe List (Adestra)
 - 📦 Shopping Cart Inclusion List (AMS) & EPC Only Subscribe List (Adestra)
 - 📦 Workshops Inclusion List (AMS) & EPC Only Subscribe List (Adestra)
 - 📦 Goal Setting & Tracking Inclusion List (AMS) & EPC Only Subscribe List (Adestra)
 - 📦 Marketing Automation Inclusion List (AMS) & EPC Only Subscribe List (Adestra)








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.

