Getting Your Users to Opt-Down Versus Opt-Out

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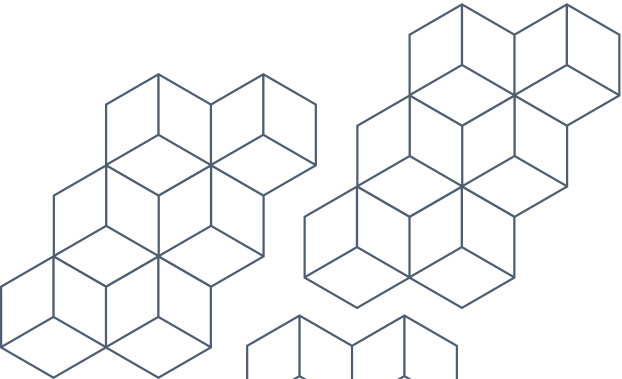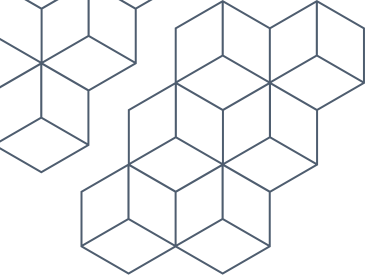
Intro

Receiving email communications from you doesn't have to be an all-or-nothing choice for your members. Associations have turned to a less black-and-white option for users trying to opt out. They've learned to create a space for their members to instead tell you what they do want to receive. The email preference center can also serve as a marketing tool to display what member benefits they could be missing out on and serve as a buffer between the user and the dreaded unsubscribe.

Users opting out of your email harms your ability to deliver your product, whether that is your content, your community, or your communications. Giving them options is shifting your communication strategy in the right direction from association-centric to member-centric and delivers on what members actually want to receive from you.

If you are blasting your messaging in a blanket-like effort without focusing on what members really value, you are bound to push your members to take action and unsubscribe. Read on to learn how to instead use an email preference center, apply best practices on how to structure one and how to implement it into your member journeys for a better member experience.

What is an EPC?

An Email Preference Center is a centralized location where users can manage their communications preferences and topical interests. It's one tool, of many, that your organization can use to put your members first. Within your emails - when you set up your EPC, the "Unsubscribe" link will take your readers to a form where they can indicate, with a great deal of granularity, which types of communications they wish to receive or how often they wish to hear from you.

Ultimately you want your members and other constituents to receive relevant and valuable information according to their preferences. You may not serve every member by sending them every message. Some may only want to receive information on educational

updates and news about your upcoming events. Other members might be only looking for career advice and volunteer opportunities. Not every message should serve every member and your email marketing strategy can better reflect that when members engage with you and tell you what they value.

The problem with a traditional "Unsubscribe" link is that you only give your readers one option to globally opt out of your communications. They might have received one too many messages about your event and only care to opt out of your event marketing messages, but given the option to only globally opt-out, they end up suppressing themselves from all of your emails.

The email preference center also builds trust with your members and constituents by giving them the ability to opt-down from the type of email that prompted them to unsubscribe in the first place, and stay opted-in to other valuable information. The EPC is an indication to the member that you respect their preferences and adhere to a smart email marketing and segmentation strategy.

The Mechanics of an EPC

An email preference center is its own stand alone webpage that is separate from your association's website, eLearning site, eCommerce store, or conference microsite. It will capture each individual's preferences using their email address to identify them and speak directly with your association management system (AMS) in real time. The preferences you collect are always stored in the database of record. Then each day as your email marketing tool is updated via the integration in place, the preferences are then stored into lists. Your lists are separated between those included in as preferences and those excluded for the greatest custom segmentation strategy. As you implement your user's preferences into your marketing strategy, you'll use a mixture of these lists to create the right message for the right audience.
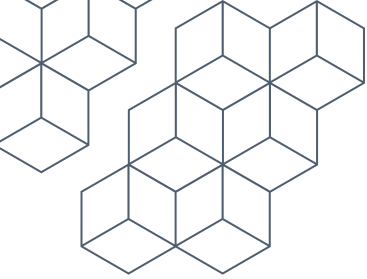
Why use an EPC?

Customization

Associations implement an email preference center into their marketing toolkit as a way to build customization into each constituent's experience with their brand and organization. With today's individualized algorithms that serve up curated shows to watch on Netflix and top song choices on Spotify, users are coming to expect a certain level of sophistication and personalization. The email preference center is one way to customize your user's experience with your organization.

Retention

As you push the programs that align with your members, you'll experience greater retention and less global opt-outs. This alignment is the crux of doing business right in today's hyper-personalized climate. Would you ever shut off your Netflix subscription when they're doing such a great job of remembering your preferences and suggesting new programming you might like? Probably not. The same goes for your users. The self-directed experience of indicating preferences is just the type of data you need to curate great content and suggest new programming your members will appreciate.

Engagement

Some organizations will go so far as building their entire buyer journeys around the self-selected topic preferences. This user data is more useful than merely segmentation. As you build a more detailed picture of your membership base by topical interest, it makes sense to build out buyer journeys that nurture and engage by audience grouping.

Adherence

Beyond the benefits to the member, implementing an email preference center is part of staying compliant with GDPR and other communication policies.
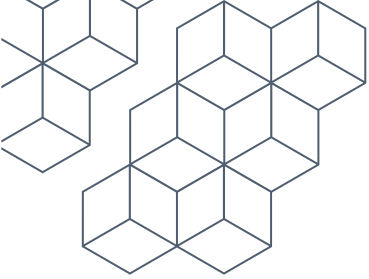
The Anatomy of an EPC

When first thinking about what will make up your email preference center, we start with the audience. Who does this email preference center serve? Will this email preference center serve members only, or a mix of members, customers, and prospects. Answering this question will inform how you will accommodate and serve up the appropriate preferences. Members might see one set of options, where prospects can only opt into a select few set of options; for example.

Sometimes you will need to serve up a limited view of your email preference center to contacts that aren't eligible for member-only newsletters, and other times you have contacts that aren't in your AMS that will still have preferences stored in your email marketing tool. As we define your audience, these scenarios will be identified. We have a solution for each and we call this pivoting and flexing. The typical EPC that just needs to go to members doesn't necessarily need either.

What is a Pivot?

When we identify an audience that needs to interact with your EPC that is not already in your AMS, then we need to add on pivot functionality. To help illustrate, here is a scenario where you would use a Pivot in your EPC:

You want your EPC available to the public (members, customers, non-members) and are using it as a member customer experience tool and an awareness tool.

What is a flex?

When we identify an audience that needs to see one set of preferences and another audience that needs to see another set, then we need to add on flexing functionality. Flexing triggers your EPC page to display differently depending on who's looking at the page. To help illustrate, here is a scenario where you would use a Flex in your EPC:

Your EPC is bundled with your Content Preference Center for a newsletter that is available only to members. A non-member can view the EPC page but will not see the Content Preferences for the newsletter.

When it comes to the structure of the EPC page itself, personalization is key. By leveraging dynamic views for members vs. non-members and customizing the categories on the page based on the types of communications you send, your readers will be able to select the communication experience that best suits their needs.

Structure

Next, let's discuss the structure of your email preference center. Ideally, we'll go farther than breaking it down by the business units of your organization (membership, advocacy, events). Instead you have the opportunity to carve up your communications by topics, programs, newsletters, and audiences. Interest areas have potential for more personalized automation sequences. If you have multiple newsletters that cover different types of information, then let your users choose which communication types make sense for them. We're seeing in some instances, that specific audiences, like job titles, should dictate how you structure the page. Your page might be a combination of all of these or as simple as topics only.

Whether you choose to carve up the preferences into topics, by events, or even audiences, consider how the data you are collecting will play into your member journeys and marketing communications and what makes sense for your organization.

Alerts

Once you've decided how to carve up your email communications strategy into preferences, the next part is much simpler. Included on the page is clear language that states how users will interact with the page to opt in or opt out. When a user decides to globally opt out, for example, inserting language that explicitly states that doing so will opt them out of all communications will help signal to the end user what they're about to do.
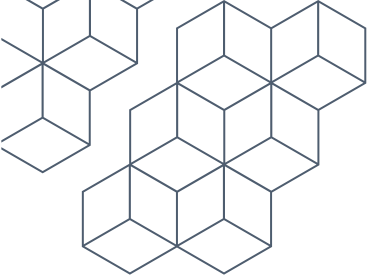
EPC Best Practices

What are best practices when using an EPC? Is the language clear and keeps you in compliance? Any language you use on the page is an opportunity to explain the function of the page, how you will use the information, and ideally make the experience on the page as seamless and self-directed as possible.

Next, there is no easy way to say this, but the preferences you spent all that time considering and including cannot come pre-checked or pre-selected. Users are going to need to make the explicit choice to opt in via the email preference center. Now you have a legal obligation to still send to members, so there is some strategy you can deploy to drive members to the page that we'll cover in the next section.

When it comes to the email preference page, there are some instances where we will deploy "Pivot" and/or "Flex" logic. Where it gets hairy is when there is other conditional logic. For example, it is not a good idea to have the user click one preference that cascades into five other preferences clicked. This wanders into scenarios that are out of compliance.

Remember, since people got here because they wanted to globally opt out, the intent of the page is to prevent that by providing options that make sense, instill confidence, and build trust. To give you a ballpark, consider limited attention spans and the user's original intent to unsubscribe when they arrive on the EPC page itself. Marketers should consider aiming for between 8 to 12 preferences as a rough guideline.

More importantly, any attempt to make it difficult to unsubscribe is self-defeating. If a recipient can't unsubscribe with one click, then they'll simply mark you as a Junk Mail sender. Your emails will no longer reach their inbox – and your sender reputation will be damaged.

To drive it home, why would you keep emailing someone who didn't want your messages? Email automation platforms charge per email sent, so you're wasting money on these
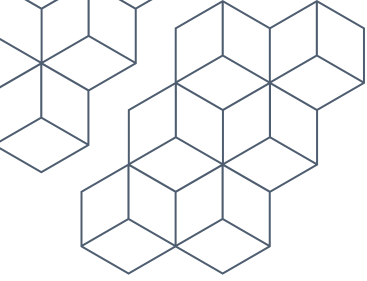
people. It's best for all parties if you make it as easy as possible to unsubscribe and instead, focus on the reasons why people unsubscribe. If you provide useful, timely, personalized content, then the unsubscribe button will never be needed.

There are going to be instances where your subscribers are going to want to globally opt out of your communications, but putting an EPC in place ensures you give them one more chance to engage. For those that ultimately totally opt out, maybe they've retired or changed careers, there are instances where it is better they unsubscribe so that you keep your distribution lists current. When you're focused on the relevant and engaged, you're delivering a member-centric experience. Applying your attention to those who are voluntarily telling you what they want to hear about is where you'll find the greatest success.
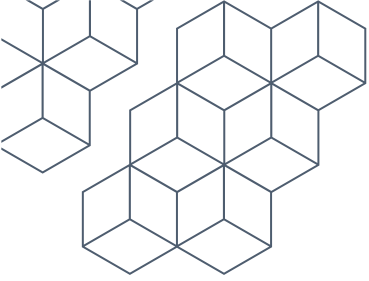
Marketing Your EPC

Now that you have the preferences sorted out, the language clearly defined, and the best practices for top performing EPC pages, let's talk about putting the page to work for your organization. Your EPC can be just another facet of the member profile area that you direct new members to during onboarding or throughout their membership with you. As you gain and gather new intel from the user's interaction with the page, you can understand where members' interests pool and build communication around popular programming into your communications calendar. Finally, you might consider promoting your email preference center to non-members from your website.

In your member profile area: Just as our members can log into their profile to change important details like contact information and job title, you can integrate your EPC form so that they can also indicate the types of communications they wish to receive from your organization.

On your website: Beyond engaging with your membership base, linking your EPC on your website's homepage invites customers and prospects to indicate their communication preferences. While not a true lead gen tool, it can serve to create awareness around your content and can even bring in new leads that you can nurture to conversion.

Finally, you've invested a good deal of time and resources into crafting the perfect email preference center, why not highlight some of that effort in one of your newsletters that are already going out to your membership base. Include messaging around the new EPC amongst other content in a relevant newsletter, or simply send out a message with only the call to action to drive users to the EPC page. We typically frame the EPC as part of a technological investment into the customer experience as a singular messaging strategy when we are warming up an IP as part of launching a new email marketing tool, but marketers may choose to send this message anytime they revamp their EPC page.
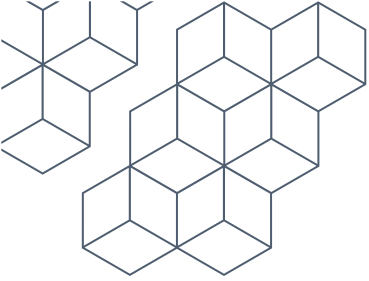
How an EPC Fits Into the Member Journey

Think of members that are interested in telling you what topics or areas of interest they have with your organization. They are an engaged audience at the ready for personalized nurturing journeys. Your organization can then take the EPC page a step further from simple preference gathering and leverage each list by topic into a personalized member journey.

By incorporating member journeys in your email marketing strategy using the data collected from the EPC form, you are further delivering relevant and timely communications to meet your members needs. It is just one strategy to further leverage what your members explicitly share with you. Each topic should lend itself to a relevant member journey that fits into what that persona and topic category would likely want to receive from you.
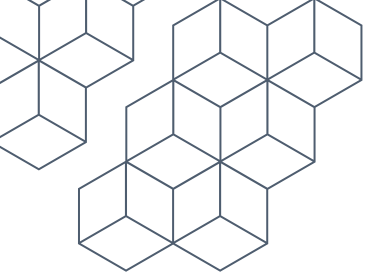
Your constituents, like everybody else, are inundated with emails. They're increasingly savvy with higher and higher expectations for greater personalization. Rather than sending out blanket, impersonal messages to your entire member and prospect base, using the information your constituents provide via the EPC enables you to send the types of communications they actually want to receive. The shift towards a less self-serving conversation with your readers is crucial to your future success in recruitment.