Email For Advocacy and Community Organizing: Basics, Essentials, and Best Practices

Email Signup Best Practices

These training materials have been prepared by Aspiration in partnership with Radical Designs and ScoutSeven

Funded by the Community Technology Foundation of California

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Learning Goals

► Best Practices for Building Email lists
  ▪ Online and Offline

► Essential Information to Collect
  ▪ Know what to ask for and what you don't need

► “Opt In” versus “Double Opt-In”

► Proper Etiquette for Engaging List Members

► Privacy Best Practices
Email Signup

Ways to Build Your List

- Online
  - Your web site
  - Make your email messages easy to forward

- Offline
  - Always have sign-up sheets at live events
  - Promote your email list in print publications
Email Signup

Use your web site as a primary conduit

- Make it easy for supporters to sign up for emails on your website
- Include links or a sign up box “above the fold” on every page
- Make sure that your sign up forms verify the basic syntax of addresses in case of typos
Email Signup

Know What to Ask For

- Do not require too much information about your supporters
  - Do you really need their name?
- Don't offer a complex form
  - They may not follow through with submitting it
- Consider sending them an email in a week
  - Give them a link to login and update their profile
  - Get extra information then, rather than all at once
Email Signup

Collect geographical information

- Geographical data lets you customize and target emails to segments of your list
- Especially useful when trying to promote an event or target an elected official
- Using just a zip code, many tools can lookup the city, state, and representatives of that person based on the postal code
Email Signup

Tell supporters when they are going to be added to your list

- Any form or tool on your website that collects user info should give an option to join your list
  - Online action center, store, donation tool, event registration, online petitions, etc

- Make sure supporters know that by submitting the form they will be added to your list
  - Include a pre-checked box that supporters can opt out with
Email Signup

Two methods to add addresses to your list:

- **“Opt-in” method**
  - Users ask to be added to your list and you add them

- **“Double opt-in” method**
  - Users request to be added to your list
  - You send an email that includes a confirmation link

- Double opt in
  - Allows you to verify the validity of the email address
  - Cuts down on spam complaints and bouncing emails
  - Will limit your list growth
Email Signup

Welcome New Subscribers

- Send welcome message
  - Thank the supporter for joining the list
  - Give directions for removing themselves in case they were added by someone else
- Set expectations about the content and frequency of messages to the list
Email Signup

Welcome New Subscribers

- Send welcome message
  - Tell them about the organization, inspire them
  - Make them look forward to your emails
- Provide options to join other lists that you offer
Email Signup

► Give supporters options
  ▪ Allow supporters to choose the topics about which they wish to receive emails
  ▪ Offer lists that have different levels of traffic
    ▪ “News” or “Announce” vs. “Talk” or “Discussion”
    ▪ Always offer digest or archive
  ▪ The more your supporters can customize their email experience, the longer they will stay on your lists
Email Signup

Be serious about privacy

- Let your supporters know when they sign up that you take their privacy seriously
- State that you will not share or sell their personal information
  - “Swapping lists” is never a good tactic
  - May not be legal
- Link to your privacy policy on your website
  - Follow the policy!
Summary

► Remember Best Practices for Building Email lists
  ▪ Online and Offline

► Know the Essential Information to Collect
  ▪ Know what to ask for and what you don't need

► Consider “Opt In” versus “Double Opt-In”

► Be Thoughtful When Engaging List Members

► Know and Follow Privacy Best Practices
End Of Section

➡️ Questions?
➡️ Comments?

Thank You!

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