

Confirmed Opt-In Guide





1601 Trapelo Road
Suite 329
Waltham, MA 02451
www.constantcontact.com

Constant Contact, Inc. reserves the right to make any changes to the information contained in this publication without prior notice.

Copyright © 1996-2008, Constant Contact, Inc. all rights reserved. Unpublished – Rights Reserved under Copyright Law of the United States. Use of a copyright notice is precautionary only and does not imply publication or disclosure.

This document contains proprietary and confidential information of Constant Contact, Inc. Use, disclosure, or reproduction is prohibited without the prior express written consent of Constant Contact, Inc. For inquiries regarding reproduction or distribution of any Constant Contact material, please contact legal@constantcontact.com.

Brush Up, Constant Contact, the Constant Contact Logo, Connect Up, Do-It-Yourself Email Marketing, Email Marketing 101, Email Marketing Diva, Email Marketing Hints & Tips, Listen Up, Open Up, SafeSubscribe, SafeUnsubscribe, Speak Up, Survey 101, Survey Hints & Tips and The Smart Way to Reach Your Customers are trademarks, service marks, or registered trademarks or service marks of Constant Contact, Inc. All other company and product names may be trademarks or service marks of their respective owners.

Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subdivision (c)(1)(ii) of the Rights in Technical Data and Computer Software clauses as DFARS 252.227-7013 (October 1988) and FAR 52.227-19 (c) (June 1987).

1 About Confirmed Opt-In

Defining Opt-In

In today's email marketing world, the terms "Opt-in", "Confirmed Opt-In", and "Double Opt-In" are thrown around loosely and often used interchangeably by those who are unfamiliar with list collection practices. Let's look at some definitions used to define the status of your list(s).

An **opt-in email** address (a.k.a. "single opt-in") is one in which the holder of a specific address has had a previous relationship with you or your business, and has given their consent to receive future email communications. This could be through web based or in-store sign-up forms, previous product or service purchases, memberships, business or other personal relationships.

Confirmed opt-in (a.k.a. "double opt-in") is a more exacting method of obtaining permission to send email. It is also a preferred method of many internet service providers (ISPs). Confirmed optin requires your potential contact (email address owner) to respond to an email confirmation request before he or she can be added to your email list. If the contact does not respond, he or she will not receive any further email communications from you.

Note

Constant Contact does not allow the uploading of purchased or rented lists, lists obtained from third parties or associations, or lists that have been appended. All lists presented to Constant Contact must be "opt-in" or "confirmed opt-in" as outlined above.

Opt-In Levels and Your Constant Contact Account

Let's now look at how these different levels of opt-in work within Constant Contact when a new contact signs up for your email.

- **Single Opt-In** – New contacts can opt-in to your list by entering their email address into a signup box or web form that you provide (either in one of your emails or on your website). A contact enters their address, and an automated welcome letter is generated from Constant Contact, informing them that they have been added to your list.

Note

- Constant Contact offers free HTML Signup Box code as well as application programming interface (API) capabilities. Please contact Constant Contact Customer Support for further details.
 - If you signed up for your Constant Contact account through AOL, you do not have this single opt-in option. As per your terms and agreement with AOL, any new contacts signed up through a constant contact signup box automatically require confirmed (or double) opt-in.
-
- **Confirmed Opt-In (COI)** – This ensures that your contacts truly want to receive email from you. When you turn COI on, new contacts submit their email address through your signup box or web form, and automatically receive a confirmation email sent to that address. The contact **MUST** click on the link or reply to that confirmation email before he or she is added to your list. If there is no click or reply, you cannot mail to that address again.

"Confirming" a new customer is strongly recommended within the email marketing industry and is fast becoming a widely accepted practice in the general public. Today more and more people are expecting to receive some type of

confirmation email and feel that the process of confirming their interest enhances the credibility and reputation of the sender.

How It Works

Though it sounds complicated, confirmed opt-in is really very straightforward. It is a very useful list management tool for:

- Confirming new contacts
- Confirming existing contacts and lists

Confirming New Contacts

Confirming new contacts is an industry best practice and you should strongly consider using it when building your list. When you turn on confirmed opt-in, new contacts that submit their email address through your signup box or web form automatically receive a confirmation email generated by Constant Contact, sent to that specific address. The confirmation email looks something like the following:

Dear Sue,

Thank you for signing up for the Lookout Inn and Restaurant's monthly newsletter! We look forward to providing you this newsletter in hopes that you'll visit us soon. Please confirm your subscription by clicking the link below or replying to this email.

[Confirm Subscription](#)

We ask for your confirmation to protect you from receiving unwanted email. If you do not respond, your email address will NOT be added to this list.

Thank you,

Larry Smith

The Lookout Inn and Restaurant

The contact MUST click on the link or reply to the email before he or she will be added to your list. If there is no click or reply, that specific address will not receive future email via your Constant Contact account. Step-by-step instructions for setting up and using confirmed opt-in are provided later in this guide.

Confirming Existing Contacts and Lists

There are two distinct methods to confirm your existing contacts and lists.

- Soft confirm opt-in, otherwise known as the "Permission Reminder"
- Double opt-in or confirmed opt-in (COI)

While radically different in their approach, both strive to achieve the same goal of confirming the customers that truly wish to continue receiving your email communications.

Soft Confirm Opt-In

A soft confirm is yet another way of encouraging your contacts to reconfirm their acceptance of your email campaigns, without the potential of losing the contact if they don't respond. The Permission Reminder is a paragraph of text that displays at the top of your email campaign. When you add the permission reminder, your contacts can either confirm their interest in receiving your mailings or completely unsubscribe. If a contact clicks the "confirm" link (a "soft confirm"), that email address is added to your "confirmed" list. The permission reminder is called a "soft confirm" because, even if the contact does not click the "confirm" link, you can still continue to email him or her.

The following is an example of a Permission Reminder:

You are receiving this email from The Lookout Inn and Restaurant because you have given us your address in order to receive our monthly newsletters, or have subscribed directly on our website. To ensure that you continue to receive emails from us, please add thelookout@hyperlook.com to your address book today. If you haven't done so already, click here to confirm your interest in receiving email campaigns from us. We greatly value your personal privacy so if you no longer wish receive our emails, click here to unsubscribe.

Confirmed Opt-In

Double Opt-In or Confirmed Opt-In (COI) is a more rigid method of confirming your contact's interests. A single email is sent from your account, requesting contacts reconfirm their interest in continuing to receive your communications.

Note

The 'Confirm Permission' template used for this communication is customizable and can be accessed within your Constant Contact account once COI is turned on. Instructions for accessing this template are provided later in this guide.

The following is an example of a confirmation email:

Dear Sue,

The owners and staff of the Lookout Inn and Restaurant would like to take this opportunity to thank you for your past interest in our business. In an effort to bring our mailing list up to date, as well as avoid sending you mail that you may no longer wish to receive, we are asking for your permission for future mailings. If you wish to continue to receive our monthly newsletter, please click the link below. We assure you that this is a safe and secure way to maintain your subscription.

Please confirm your subscription by clicking the link below or replying to this email.

[Confirm Subscription](#)

We ask for this confirmation simply to protect you from receiving unwanted email. Please be assured that if you do not respond, your email address will not be kept on our list, and you will not receive any future email communications from The Lookout Inn and Restaurant.

Thanks once again for your continued support through the years! We look forward to your next visit soon.

Larry Smith

The Lookout Inn and Restaurant

When this confirmation email is first sent, your contact's address is displayed in your account with an "Awaiting Confirmation" status. They remain in this status until the contact clicks the confirmation link or replies to the email. If they do not respond, they remain in "Awaiting Confirmation" status indefinitely and you cannot send them future emails.

If they do respond (by clicking on the link or replying to the message), they are taken to a special web page that acknowledges their confirmation. Their email address is now listed with the status of "Active", and you are able to email them unconditionally.

The "Awaiting Confirmation" line on the contacts report refers to existing contacts who have not yet replied to a confirmation request. It does not include new signups from your website's visitor signup box who have not responded.

Note

You may not export contacts who are in the “awaiting confirmation” status, and you are not charged for those contacts.

Alert

Confirmed opt-in permission guidelines are very strict. You cannot use Constant Contact (or any other email delivery tool) to send future emails to anyone who has not responded. If you attempt to send email to any unconfirmed address (Awaiting Confirmation), your Constant Contact account will be terminated. However, you may contact those in the “Awaiting Confirmation” category either by telephone or direct mail, and ask them to re-subscribe to your list using your website’s Visitor Signup box.

Why You Should Use COI

The use of Confirmed Opt-In (COI) is considered an industry “best practice”. It is always a good idea to grow and maintain your list using COI methods. Here’s why:

- COI lowers your chances of having spam complaints made against your mailings by ensuring your readers actually want to receive your email.
- COI eliminates the possibility that an erroneous or problematic address may be added to your list, i.e., someone signing up with a spamtrap or somebody else’s address, thus “poisoning” your list.
- COI improves your deliverability rate. Mail to those contacts who confirm is sent from special mail servers and IP addresses that are very rarely blocked.
- Since COI has become more prevalent and accepted within the past two years, your contacts will not be surprised by the confirmation email.
- COI is favorably viewed by the general ISP and receiving community.
- Confirmed opt-in is not only useful for growing a list, it’s also very useful for maintaining a list. There are times when you may want to confirm an existing single opt-in list, to ensure it is still current.

Improved Deliverability

Confirmed email campaigns are sent on a reserved set of IP addresses.

Some ISPs and smaller mail providers require confirmed opt-in for email delivery. We provide these ISPs with lists of Constant Contact IP addresses that are confirmed opt-in mail. In turn, these ISPs deliver a one-time confirmation email to contacts. If the contact confirmed the mailing, the ISPs deliver ongoing future emails as well.

As you are mostly likely aware, the amount of junk email (spam) has grown dramatically in inboxes all over the world. As a result, ISPs and corporate mail administrators are frantically seeking solutions for their overloaded systems and annoyed customers. None of the available solutions (content filters, blacklists, etc.) are completely effective and all of them generate false positives (legitimate emails that are inadvertently blocked from delivery).

To fight spam, some ISPs now require confirmed opt-in for email delivery. Because of the subscription tracking capabilities associated with confirmed opt-in, ISPs can better differentiate legitimate commercial email from spam and protect their customers from receiving unwanted email.

When to Re-Confirm Your Existing Contact List

There are times when you may want to confirm a list which was originally grown with single opt-in. You can use the Confirmed Opt-in feature to manually request confirmation from contacts already on your list by sending them a

campaign with our “confirm permission” template. It’s a good idea to manually confirm permission if you wish to do the following:

- Continue to use a permission-based list that is receiving high complaints.
- Refresh a permission-based list that is older than one year. Often, lists collected over a year or more ago may begin to perform poorly and collect more spam complaints.
- Work with a list that was gathered offline and is receiving high complaints, e.g., store guest-book or conference signups.
- Communicate time-sensitive or event-oriented information, e.g., wedding vendors and planning information.

In most cases, manually confirming your existing list helps you

- Increase email deliverability to your interested contacts.
- Improve your open and click-through rates.

Although your overall list size may shrink considerably, think of it as a way to improve your overall marketing acquisition/retention costs. After confirming contact permission, you will only pay for contacts who are truly interested in your email and who are most likely to do business with you again in the future.

Do NOT manually confirm if:

- Your list was not permission or consent-based to begin with.
- Your current permission-based list has a low complaint or low bounce rate.

Working with Existing Contacts

If you are planning on reconfirming your list by sending your contacts a COI email, it is always a good idea to send a separate email prior to the COI email. By doing so, this will alert them that you will be sending a confirmation email out to them shortly. You want to notify contacts because, once your confirmation email is sent, your contacts will not be able to receive any future communications if they do not reply back to you. This notification will simply let them know they should be on the lookout for your confirmation request.

Note

To reach any existing contacts with domains requiring confirmed opt-in for delivery, you need to send the message from another email address.

Prohibited Use of Confirmed Opt-In

Confirmed Opt-In is NOT a tool for ‘scrubbing’ or “cleaning” your contact list(s). Constant Contact expects that ‘due diligence and list hygiene’ is performed prior to uploading any list into the Constant Contact system. If you use Confirmed Opt-In to simply clean up a non-consent based or poorly managed list(s), your Constant Contact account will be terminated.

2 Using Confirmed Opt-In

Confirming New Web Site Visitor Signups

It's easy to confirm contacts when they signup for your email from your website.

Confirming New Signups

To confirm new web site visitor signups, you must enable your account for Confirmed Optin. When you enable your account for Confirmed Opt-in, each new website visitor who subscribes to your newsletter receives a confirmation email, requesting that they verify their interest in receiving your email campaigns.

To confirm new web site visitor signups:

1. Enable your account for Confirmed Opt-in.
 - a. From the **My Settings** tab, click **Manage My Settings**.
 - b. Next to Confirmed Opt-in, click **Edit**.
 - c. Scroll down to the bottom of the page.
 - d. Click the button next to **Confirmed Opt-in - On** and click **Next**.
 - e. Read and check off all five of the user agreements and then click **Finish**.
2. Customize the Confirmed Opt-in email for Visitor Signup.
 - a. Click the **"Edit Visitor Signup Confirmed Opt-in Email"** link.
 - b. Go through the Wizard and read through the populated template. We have already included the best industry verbiage for you, but feel free to add a little information about your company, if you wish. However, don't forget that the goal is to keep this email as clean and concise as possible and not clutter it with ads.
 - c. When you have finished editing, click **Save & Next**.
 - d. Go to the end of the Wizard and make sure **Activate Changes** is selected.
 - e. Click **Finish**.

Note

You also can find this email under My Settings > Site Visitor Signup.

Changing "From" Address on Confirmation Emails

To change the default "from" address on your confirmation emails:

1. From the **My Settings** tab, click **Manage My Settings**.
2. Click **Edit Signature Info**.
3. Change the **Signature Name** as desired.
4. Change or add a new verified **Signature Email Address**.
 - If you have more than one verified email address, you can simply select the one you want.
 - If you want to add an address that is not listed, you must first verify it.
 - a. Click the **verify more email addresses** link.
 - b. In the text box, type the email addresses you want to verify, then click **Send Verification Email**.
 - c. From your email client, respond to the verification email that Constant Contact sent to the specified email address.
 - d. Return to **Manage My Settings**, then click **Edit Signature Info**.

- e. Select the desired **Signature Email Address**.
5. Click **Save** to save your changes.

Turning Off Confirmation for the Visitor Signup Box

You can choose not to require confirmation of email addresses from your website visitors.

To turn off confirmation of new web site visitor signups:

1. From the **My Settings** tab, click **Manage My Settings**.
2. Next to Confirmed Opt-in, click **Edit**.
3. Scroll down to the bottom of the page.
4. Click the button next to **Confirmed Opt-in - Off** and click **Next**.

Confirming an Existing List

Two ways to confirm your existing contacts are to send a campaign asking for confirmation, or to ask for confirmation with each email (the Permission Reminder).

Creating A Confirmation Email Campaign

Constant Contact has some features that make it very easy for you to send a “Confirmation Email Campaign” to confirm your existing contact list. You must do three things:

1. Enable your account for Confirmed Opt-in.
2. Customize the Confirmed Opt-in email for Visitor Signup.
3. Format the confirmation email that will be sent to all of your contacts.
 - a. From the Confirmed Opt-in screen, click **Send a Confirm Contacts Email**.

Note

You also can set this from your account home page.

1. Click **Create an Email Campaign**.
2. From the Template Picker, click **Create a Confirmation Email**.

-
- b. Enter an email name and click **Next**.
 - c. Under the **Category** drop-down box, click **Create a Confirmation Email**.
 - d. Go through the wizard, adding content and making edits as necessary.
 - e. When you have finished editing, click **Save & Next**.
 - f. Select the **Interest Category** that will receive the email and click **Next**.
 - g. Set the **Email Campaign Status** and then click **Finish**.

Note

Use “Create a Confirmation Email” to send a confirmation email every time you import new contacts into your account. This confirmation email only sends to those who have not already received a confirmation email from you.

Using Permission Reminder

Another way to confirm existing contacts is the Permission Reminder. The Permission Reminder is a paragraph of text that displays at the top of every email you send. When you add the permission reminder, your contacts can

either confirm interest in receiving your mailings or completely unsubscribe. If a contact clicks the “confirm” link (a “soft confirm”), that email address is added to the “confirmed” list, and all future email sent to it goes through special confirmed servers that are very rarely blocked. The permission reminder is called “soft confirm” because, even if the contact does not click the “confirm” link, you can still continue to email him or her.

As with all email campaigns, you can expect 85% of your responses to occur within 48 hours of sending the campaign.

To turn on the Permission Reminder:

1. Open the desired email for editing.
 2. On the first window, click the button next to **Permission Reminder On**.
 3. Click **Save** to continue editing your email, or **Finish** to exit.
-

3 Understanding Results

How do I calculate my confirmation rate from a confirmation campaign?

To determine the percentage of contacts who have clicked on the confirm link or replied to the confirmation email:

1. From the Reports tab, look up the number of clicks for your confirmation campaign.
2. Divide that number by the total number of emails sent. This is your confirmation rate.

This number typically increases during the first two weeks after a campaign is sent.

Why are some confirmation email replies coming back to me?

The confirmation email offers two ways for the contact to confirm. The contact may click the link in the email, or reply directly to the email. If a contact opts to reply to the email, normally the reply would go directly to Constant Contact, not you. When Constant Contact receives the reply, the contact's status is changed to 'confirmed' in your account and you can now send your campaign emails to that contact.

In some cases however, the mail server on the contact's side may misconstrue the reply address in the confirmation email and causes the reply to go directly to you. In this case, the contact will not be confirmed.

If you find that you have received the contact's reply, you might try the following:

- Open the reply in your inbox and click the confirmation link within the email for your contact.
- Contact your person directly and ask him/her to click the link in the confirmation email instead of replying.
- Send another confirmation email. If your contact no longer has the confirmation email on hand, then use your Constant Contact visitor signup feature to easily generate another confirmation email:
 1. Make sure confirmed opt in is turned 'On' in your account. Click the contacts & Lists tab on the main toolbar. Click Confirmed Opt In, scroll down the page, and click On.
 2. Have the contact go to your site and join your list using your visitor sign up feature (or you may do this for him/her). Upon subscribing, a new confirmation email will be sent to him/her.

I tried to edit a contact's email address but it isn't editable. Why not?

If you are not able to change the contact's email address, this indicates that the contact is someone who confirmed through our Confirmed Opt-in feature. You cannot edit a confirmed email address. Instead you must remove the old address, and then add the new address manually