

Email Signature Management Solution Buyer's Guide



2nd
Edition

Email Signatures Buyer's Guide

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Choosing the Right Email Signature Solution

Every company goes through the exact same issues as they grow – initially, everyone uses their own email signature template. At some point in this growth, an executive decides everyone needs to have a uniform signature. IT then provides documentation on how to set up the organization’s standard signature. This kind of one-off, manually-accomplished signature – despite the end result being a pretty uniform template across the company – fails to meet the needs of organizations with far more complex signature needs.

You’re reading this Buyer’s Guide because you already know you have several departments that have specific signature needs. Marketing likely has some branding guidelines and leaving it to the individual employee is no longer either feasible or reliable.

So, you need an email signature solution – one that not only automates the process of deploying signatures, but also simplifies their creation. More advanced solutions will even go as far as to actually empower email signatures to be a tool that enhances customer relations, increases prospect engagement, and improves corporate communications.

The question then becomes, *how do you select the right solution that meets your specific needs?* In this Buyer’s Guide, I’ll cover the critical (and not-so critical) email capabilities found in today’s email signature solutions and provide worksheets that will help you determine which of the solutions on your shortlist are right for your organization.

- Nick Cavallancia, Microsoft MVP

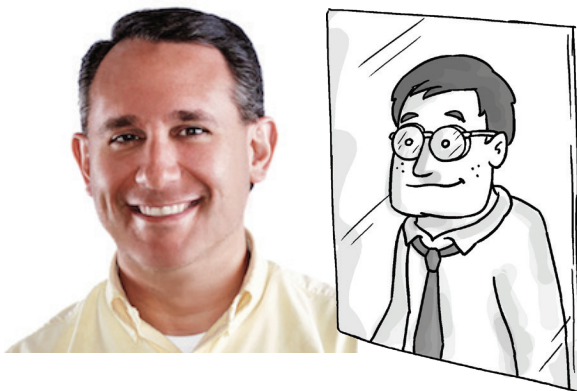


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How to Use This Guide

How to Use This Buyer's Guide

Conversational Geek Buyer's Guides help you assess and choose the right solution for your organization. We do this by breaking the guide into two parts.

Buying Criteria

We first provide you with a number of important buying criteria to consider here in this PDF. Each criteria section focuses on a particular set of features and capabilities available by solutions today. Those capabilities are then broken down into two distinct categories:

- **Required:** The capabilities listed in this criteria category are those that are fundamental for purchase consideration. Any solution you consider on your shortlist should have the capabilities listed at a minimum.
- **Optional:** The capabilities listed in this criteria category are features that will enhance your use of the solution but aren't part of the core required capabilities. An optional capability might be considered innovative in nature or simply be of value but only to organizations with specific needs.

Start by reading the *Buying Criteria Detail* portion of the Buyer's Guide, taking note of which capabilities are important to you, regardless of whether they are listed as *Required* or *Optional*.

Evaluation Worksheets

We then provide you with a URL that points to an online Evaluation Worksheet designed to let you evaluate each solution you are considering – and determine a winner.

Evaluation Worksheet for Mousepad

Sponsored by **erghonomics**

How to Use this Worksheet

With this online Evaluation Worksheet you may evaluate up to 5 vendors you are shortlisting. Click on each of the vendor tabs, provide a name, and fill out the evaluation criteria tables. Once completed, click on the Summary tab to view a comparison of your shortlisted vendors and to download a PDF version.

PC Stuff Co MouzPadz WristSuppt x + Vendor Summary

ENTER VENDOR NAME WristSuppt

Mousepad Basics	
Required Features	
Capability	Availability
Ergonomic Design	✓



Buying Criteria Detail

Email Signature Content
Email Signature Consistency
Manageability
Communication
Role-Specific

Email Signature Content

The value of any email signature solution is going to be first measured in what content can easily be added to the signature itself. This criteria section focuses on both how signatures can be created, as well as what types of details can be added and where the details are sourced.

Required Features

- **Support for Common Signature Elements:** Being able to utilize address fields, embedded or linked images, text, tables, and hyperlinks to signatures, all using desired fonts, sizes, and colors is required to ensure consistent branding while allowing for signature customization.
- **Tailored Social Media Support:** Every organization needs to include some reference to their presence on social media. Signatures should be easily able to include desired social media icons or references.
- **Legal Disclaimers:** Because of their importance to legal and regulatory compliance, this signature element is called out specifically as a requirement. Multiple disclaimers should be supported to accommodate regional regulatory compliance mandates.
- **Directory-Based Detail Population:** Common fields such as first/last name, title, email, and phone should be populated by a directory service such as Active Directory, Azure AD, or Google Directory. This ensures consistency and up-to-date details within signatures.

Optional Features

- **Custom Fonts:** Having the ability to upload fonts outside of a default set allows signature text to match corporate branding.
- **Matching Social Media Icon Colors to Branding:** Icons can be presented in custom colors that align with corporate branding.
- **Signature Integrations:** Signature content can take advantage of functionality either built-in or through integrations with third-party solutions that offer in-signature features such as taking 1-click surveys or scheduling meetings, making signatures interactive and actionable.
- **Directory-Based Secondary Detail Population:** There are additional custom attributes within a directory that fall here as optional, such as pronouns and profile picture.
- **Support for Multiple Banners and Links:** Banners can be scheduled to be presented within a signature for specific durations, with an ability to rotate through all selected. Banners with multiple calls-to-action within a single banner may also be supported.



Why Start With Signature Content?

You can have the most powerful email signature management solution in the world with countless capabilities making the creation, assignment, and management of signatures super easy, but if the signature content doesn't meet your business needs, none of those other capabilities matter.



Email Signature Consistency

Once one or more signatures have been created, it's important that every employee uses the appropriate template, regardless of email client and device used. This criteria section focuses on some of the features that ensure consistent signatures across an organization.

Required Features

- **Multiple Automated Deployment Methods:** To maximize the value of a standardized email signature, it needs to be used by everyone within the organization. Signatures should first be able to be automatically deployed at the client level, including Microsoft Outlook, Microsoft 365's Outlook on the Web, and Gmail. It should also be appended to emails to accommodate any unsupported email clients. This server-side deployment is generally available on Microsoft 365, Microsoft Exchange, and Google Workspace. Having both methods of automated deployment available ensures that the appropriate email signature is always present, no matter the client or device used.
- **Branding-Centric Signature Styling:** Email signature consistency isn't just about guaranteeing everyone consistently has a signature in the first place; it's also about ensuring the signature is consistent with corporate branding. Signature creation should support utilizing corporate colors, fonts, imagery, links, and overall styling to have a completed signature adhering very closely – if not perfectly – with corporate branding guidelines.

Optional Features

- **See Signature Within Email Clients:** Users can see the assigned email signature within the Outlook and Gmail clients, for example, as part of creating an email, replying to one, and seeing the placed signature within Sent Items.
- **Select Signatures from Within Email Clients:** Users presented with more than one signature option can preview possible email signatures within Outlook, allowing them to choose the appropriate one they'd like to use.



Why Consistency Matters?

Your email signature is an extension of your brand and, as with your products and services, your customers expect a consistent signature where they know they can always find that direct support link, the phone number of their account exec, or your handle on Twitter.



Manageability

Looking “under the hood”, it’s equally important that the creation and ongoing management of email signatures be simple, user-friendly, and flexible enough that anyone in charge of signatures – whether technical or not – can accomplish the tasks associated with email signature management.

Required Features

- **Web-Based Management:** In today’s cloud-first and hybrid-cloud environments, it’s imperative that management of email signatures be readily accessible via the web, rather than by using an on-premises solution.
- **Intuitive User Experience:** Solutions should be designed to empower users outside of IT to access and manage signatures without technical assistance, enabling speed of delivery through intuitive interfaces and workflows.
- **WYSIWYG Editor:** Because non-technical users (such as those in Marketing and HR) may be responsible for creating and managing signatures, the solution should use an intuitive “drag and drop” editor that does not require knowledge of HTML. This ensures all users of the solution can be successful.
- **Template-Based Signatures:** Different locations, departments, and teams may require a distinctive signature. Templates enable organizations to create different signatures to be used by groupings of employees while still maintaining proper branding.
- **Role-Based Access:** Users should be able to be assigned roles such as an administrator or editor, with permissions granted that allow the performing of specific tasks on specific signatures.
- **Import of Existing Signatures:** The importing of existing email signature HTML code allows for editing and eventual deployment of existing signatures organization-wide.
- **Granular Signature Assignment:** Signatures should be able to be assigned to designated users, groups of users, email addresses, and other properties within the organization’s directory service (e.g., Active Directory, Azure AD, Google Directory).
- **Scheduling of Signature Deployment and Removal:** Signatures should optionally be subject to date/time triggers corresponding to significant corporate events, where a signature can be either deployed (whether repeatedly or one-off) or removed.

Optional Features

- **Leading Email Platform Support:** Support for leading email solutions including Microsoft 365, Google Workspace, Exchange Server (on-premises), hybrid Exchange environments, and major CRM and marketing automation platforms. This feature is listed as optional, as the required platform support will be organization specific.



Manageability is Key

It’s necessary for more than just IT to be involved in email signatures for them to be successful. Manageability features ensure those closest to establishing signature requirements, as well as those creating, deployment, and adopting signature can do so quickly and easily, without IT intervention.



- **Signature Targeting:** An ability to use email type (New vs Reply), subject, email content, internal vs. external recipients, email domains (including the use of wildcards), and individual email addresses to designate which signatures are used, when, and how they will be deployed.
- **Usage Analysis:** Analysis of email signatures in use, emails sent with/without signatures, and how signatures are being applied is possible to determine overall utilization of email signatures.
- **Hyperlink Analysis:** Clickthrough reporting of traffic generated by banners and images provides insight into engagement, watching of linked video content, and can be used for campaign A/B testing and retargeting based on previous click-through behavior. Solutions may use in-application analysis, Google Analytics, and other third-party tools.

Communication

An email signature isn't just a necessity at the end of an email; it's an opportunity to turn email signatures into an *effective means of communicating* those details the organizations wants to be known – from promotions, to establishing credibility, to enabling further conversations, to establishing compliance, and more. As the communication needs vary within an organization, there are no *Required* features in this criteria section.

Optional Features

- **Recipient-Based Signature Rules:** Allows organizations to target specific messages based on what domain an email is being sent from or to (with support for wildcards to broaden rule application), whether they are a prospect or customer (e.g., encouraging customers to attend an upcoming conference, or directing prospects on how to engage with Support), where the recipient is in the sales cycle (e.g., promoting credibility-building case studies towards the end of the sales cycle), location (e.g., appending EU-specific compliance-required verbiage), if the recipient is internal or not (can send company-specific updates, promotions, and information), and more.
- **Custom Social Media Icons:** When utilizing Exchange's Send On Behalf functionality, clients can choose from one or more signatures assigned specifically for this scenario.
- **Signature Support for Images & Links:** Allows recipients to easily connect with the sender through social media channels. credibility and engagement on the part of prospects.
- **Send On Behalf Signatures:** When utilizing Exchange's Send On Behalf functionality, clients can choose from one or more signatures assigned specifically for this scenario.



Signatures are More Than Just Contact Details

Email signatures can be used for more than simply providing details about the sender. They can be an effective means of communicating promotions, establishing credibility, engaging prospects, directing customers to support, and asserting legal and compliance notices.



Role-Specific

There are a number of potential email signature buyer personas, each with their own needs and focuses when it comes to the features required within a solution. This section will cover five key buyer roles within an organization that have unique needs from an email signature solution – *IT, Marketing, HR, Legal, and Customer Success*. Some of the selection criteria will overlap with previous criteria sections, while some found here are completely new.

Required Features - IT

- **Security:** The process of generating and applying email signatures can potentially expose an organization to risk. Solutions should have specific precautions around accessing directory service details, ensure email is encrypted when applying signatures server-side, and have support for some form of role-based access.
- **Resiliency:** All systems supported by IT, including SaaS solutions based in the cloud, need to demonstrate some form of redundancy that results in 99.9% uptime or better.
- **Data Privacy:** Email content can easily include sensitive information and, in order to apply email signatures, the solution chosen must access every email. The solution must be ISO/IEC 27001 certified to demonstrate that information security standards are in place that ensure the privacy of customer data. Additionally, customer settings and cached information can be maintained regionally to address data sovereignty requirements.
- **Service Location:** As signatures are applied, the location of the service applying the signature comes into scrutiny and data sovereignty comes into question. Understanding where any SaaS-based solutions physically reside means it is clear that email data only passes within acceptable geo-locations.

Optional Features - IT

- **Ease of Deployment:** The solution chosen should be easy to install, configure, implement integrations, establish RBA, and maintain.
- **Delegation of Responsibilities:** Teams, groups, and departments outside of IT (such as Marketing, HR, etc.) should be able to be granted secure access and be handed off an appropriate level of permissions to perform necessary tasks.
- **Administrative Usability:** It's preferred that the implemented solution be designed with non-technical users in mind to minimize the necessary interaction with IT.
- **User Editing of Signature Details:** Rather than requiring IT to modify details within the directory service used, users can modify signature-related personal contact details themselves, overriding directory-based details. Examples include working hours, planned vacations, and preferred gender pronouns.



Meeting Multi-Faceted Needs

Whatever your role, many parts of your organization will have their own requirements of a new set of standardized email signatures. It's important to engage with the roles listed here and get their input on whether these features are necessary as part of your selection.



Required Features - Marketing

- **Consistent Branding:** Signatures can be created and deployed with all elements (font, colors, sizes, imagery, etc.) that adhere to corporate branding guidelines.
- **Direct Access:** There should be no need for IT to be involved in using the solution on a daily basis.
- **User-Friendly:** There should be no need to learn a new set of skills (e.g., HTML coding) to be successful when using the chosen solution.

Optional Features - Marketing

- **Flexible Signature Content:** Having the ability to add in awards, certifications, and links on an as-needed basis helps to create engaging signatures that align with Marketing's objectives.
- **Scheduling Signatures:** Empowers Marketing to update signatures to offer timely promotion of product launches, webinars, and upcoming live events, all while also being able to remove those same elements automatically when desired.
- **Signature Targeting:** Defining who gets a particular signature allows Marketing to segment outbound messages for employees, contractors, customers, prospects, partners, and more.

Required Features - HR

- **Accuracy of Signature Details:** Employee details should be dynamically sourced from a directory service or system of record to ensure they are current and correct.

Optional Features - HR

- **Use as an Internal Communications Channel:** With an ability to segment internal communications, HR can add in company-specific elements to signatures such as announcements, a link to the company newsletter, surveys, and more.



Required Features - Legal

- **Add Legal Disclaimer:** Avoids legal risk inherent to employees composing emails from the company address saying whatever they want.
- **Add Compliance Disclaimer:** Allows outbound communications to include details on being compliant with regulations such as GDPR (General Data Protection Regulation), HIPAA (Health Insurance Portability and Accountability Act), the UK Companies Act, and more.

Optional Features - Legal

- **Signature Targeting:** Using different disclaimers for groups, locations, and countries, instead of just one company-wide, allows Legal to minimize risk no matter where in the world emails are sent and do so with succinct, contextual verbiage.

Required Features - Customer Success

- **Signature Assignment:** Assigning specific signatures to employees in departments that are customer-facing (e.g., Sales, Support, Accounts Receivable) enables a consistent message and experience for customers.

Optional Features - Customer Success

- **Integrations:** Outbound email via CRM and marketing automation platforms can be integrated to ensure consistent signature-related customer experiences when communicating via email.
- **Real-Time Click Alerting:** Appropriate individuals or teams (e.g., Sales) can be notified via email when recipients engage with a link or banner within a signature.
- **Signature Interactions:** Signature element interactions (such as surveys and meeting booking links) can enable customers to engage better with your organization.



Choose the Right Solution for You: Using the Online Evaluation Worksheet

You can access the Email Signature Solutions
Evaluation Worksheet online at:

goto.cg/3BkOUyT

If you'd like instructions on how to use the online Evaluation
Worksheet for this Buyer's Guide, keep reading!

Using the Online Evaluation Worksheet

Use the URL provided on the previous page to navigate to the online Evaluation Worksheet for this Buyer's Guide. To use the Evaluation Worksheet, take the following steps:

Step 1 - Add in Your Vendors

Start by filling in the vendors you've shortlisted – you may evaluate up to 5 vendors.

PC Stuff Co	MouzPadz	WristSuppt ×	+ Vendor	Summary
-------------	----------	--------------	----------	---------

ENTER VENDOR NAME WristSuppt

Mousepad Basics	
Required Features	
Capability	Availability

Step 2 – Assess Each Vendor's Solution Capabilities

Each buying criteria set and associated capabilities are represented in the worksheets, split up between *Required* and *Optional* features:

Mousepad Basics			
Required Features			
Capability			Availability
Ergonomic Design			
Memory Foam Wrist Rest			
Non-Slip Base			
Optional Features			
Capability	Importance	Score	Calculated
Available in multiple colors	o v		o
Available in multiple sizes	o v		o
Total Optional Score			o



For *Required* capabilities, assess whether these capabilities are available for each solution, checking the box next to each capability under the **Availability** column. For *Optional* capabilities, assign a value in the **Importance** column representing how important each capability listed is to your organization on a scale of 1-10 (with 10 being very important) – doing this one will carry over to every vendor. Then in the **Score** column, assign the solution a subjective score, again on a scale of 1-10, with 10 being the highest. A **Calculated** value will be determined by automatically multiplying each **Importance** value with the corresponding **Score** value. A **Total Optional Score** will be derived from the sum of the **Calculated** values. When done, your worksheet should look something like this:

Mousepad Basics			
Required Features			
Capability			Availability
Ergonomic Design			✓
Memory Foam Wrist Rest			
Non-Slip Base			✓
Optional Features			
Capability	Importance	Score	Calculated
Available in multiple colors	8 ▾	10 ▾	80
Available in multiple sizes	3 ▾	1 ▾	3
Total Optional Score			83

Repeat this process for each vendor.

Step 3 – Review and Download an Evaluation Summary

Click on the **Summary** tab to see how your shortlisted vendors match up:

Mousepad Basics: Required Features				
Capability		PC Stuff Co	MouzPadz	WristSuppt
Ergonomic Design		✓		✓
Memory Foam Wrist Rest		✓	✓	
Non-Slip Base		✓	✓	✓

Mousepad Basics: Optional Features				
Capability	Importance	PC Stuff Co	MouzPadz	WristSuppt
Available in multiple colors	8	32	80	80
Available in multiple sizes	3	18	30	3

Press the **Print Summary** button to download a PDF version of your evaluation.



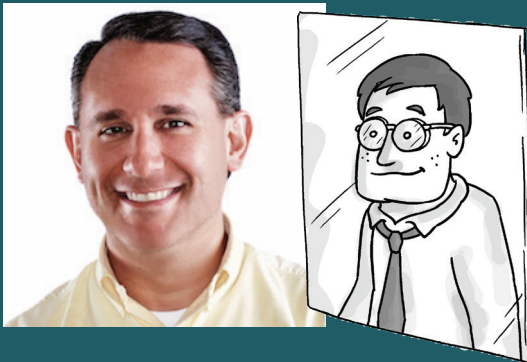


To learn more, visit www.exclaimer.com

About the Sponsor

Founded in 2001, Exclaimer provides world-class centralized email signature management solutions. These enable organizations globally, of any size, to achieve brand consistency, legal compliance, and customer engagement on any device. Its solutions for Microsoft 365, Google Workspace, and Microsoft Exchange are used by over 50,000 companies worldwide in 150+ countries. Its diverse customer base includes renowned international organizations such as Sony, Mattel, UNICEF, AT&T, Bank of America, the BBC, Volvo, Canon, and many more organizations of all sectors and sizes.

Exclaimer solutions are regularly recommended by Microsoft MVPs (Most Valuable Professionals) and have an exceptional reputation within the Microsoft community.



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Nick Cavallancia is a 4-time Microsoft MVP, a Technical Evangelist by trade, and is a 25+ year IT veteran who regularly speaks and writes for some of today's most recognizable companies.



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