



AutoMark™ FAQs

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This document provides answers to the most common questions on how to get started and how to get the most from using AutoMark as your e-mail marketing assistant.

What is AutoMark?

AutoMark is Emerald's new online marketing solution designed to help you reach your market on a regular basis. AutoMark allows you to send NASD-reviewed e-mail marketing to segmented target audiences.

Why should I use AutoMark?

Marketing research studies (MarketingSherpa, Inc.) have shown that e-mail marketing, when used as personal/business promotion, was the most effective marketing channel, generating the highest ROI in 2004. E-mail has also been the most popular form of communication among wired seniors (www.pewinternet.org).

AutoMark combines unique e-marketing capabilities because it offers you the right content, at the right frequency, with the right touch:

- Content Library contains over 200 marketing pieces that are NASD reviewed.
- Frequency rate is based on in-depth research of clients' effective response rates to marketing campaigns.
- Communication touches promote you as the trusted advisor, motivating your clients to contact you and take action.

How can I get started?

Contact an Emerald Marketing Consultant at 800-233-2834, Extension 5556. He or she will walk you through the setup process, demo the application, and answer any questions you may have about AutoMark.

How often can I send e-mails?

Emerald's research has shown that e-mail campaigns should be sent on a monthly basis. High-volume commercial e-mail may be perceived as unsolicited e-mail, also known as spam, by receivers, which could have a negative impact.

What is Fast Tracks?

Fast Tracks is the automated e-mail marketing engine that serves as the core of AutoMark. Fast Track e-mail campaigns are preprogrammed to deliver content to your select target clientele. In order for your clients to start receiving your e-mail marketing

campaigns, you need to assign your client list to specific content tracks. AutoMark does the rest for you.

Can I have a client on two different tracks (i.e., one on the Basic and one on the Retirees)?

The Basic and Retirees tracks are continuous deliveries of Fast Tracks, which restrict deliveries to one track per client. Other noncontinuous deliveries in AutoMark, such as Special Campaign Tracks and Quick Deliveries, allow you to send multiple campaigns to the same client.

Do I have to send everything on the track?

No, you can exclude any delivery item within a track, as well as disable the entire track, if you want to.

To exclude a delivery item within a track, go to the Fast Tracks Tab, click on Continuous Content, select and open the track you wish to modify, and uncheck the delivery item you wish to cancel in the Include column.

Can I upload custom items to the track?

You cannot upload your own content into AutoMark tracks or the library. Yet you can create custom deliveries to reach special groups of clients using a myriad of items from the AutoMark Library. The AutoMark Library comprises over 200 NASD-reviewed content items that you can combine into custom deliveries. These custom pieces require compliance approval before their delivery and can be saved in the Filecabinet for further use.

What are Special Campaigns?

Special Campaigns are “drip campaigns,” short tracks consisting of fewer than six deliveries addressing particular financial topics. The track sends e-mail campaigns at preset intervals until the track is complete.

Why would I use a Special Campaign?

Special Campaign tracks feature popular financial topics such as annuities, mutual funds, insurance, etc. This type of campaign is useful when you need to educate your clients about any of these topics.

Can a client be on a Fast Track and be sent a Special Campaign?

Yes, you can have a client selected to a Fast Track and also schedule him or her to receive a Special Campaign.

How often does Emerald add new campaign topics?

Emerald will include new Library items and campaign topics to both the Continuous Content and Special Campaign Fast Tracks on a quarterly basis.

What is Select & Send?

Using the Select & Send feature of AutoMark, you can control the content and frequency of your e-mail marketing. You will be able to choose delivery items from AutoMark's extensive library and customize your messages to target audiences. Using Select & Send, you can choose custom templates, Quick Deliveries, Cards and Reminders, and much more. While using the Select & Send delivery type, you may disable the Fast Tracks deliveries.

What are Quick Deliveries?

Quick Deliveries have pre-approved content offered through the Select & Send delivery. These campaign pieces are grouped into three categories: six key areas of financial planning, products and services, and target audience. They are ready-to-go pieces that can be sent immediately to respond to a client's request or need.

When can I start to send e-mails to my clients?

You can start sending e-mail campaigns to your clients as soon as you complete the setup process, which consists of creating your personal profile, having it approved by compliance, and having your client list loaded into AutoMark by an Emerald Tech Specialist.

What is the setup process?

Your Emerald Tech Specialist will guide you through the setup process, which consists of two basic steps:

1. Create your personal profile: you will upload your digital photo and business information into AutoMark.
2. Load your client list into AutoMark. Your Emerald Tech Specialist will load your client e-mail list into AutoMark.

What are e-mail marketing best practices?

To learn about e-mail marketing best practices, please read:

- _ E-Marketing Best Practices
- _ How Emerald Complies with the Federal CAN-SPAM Act