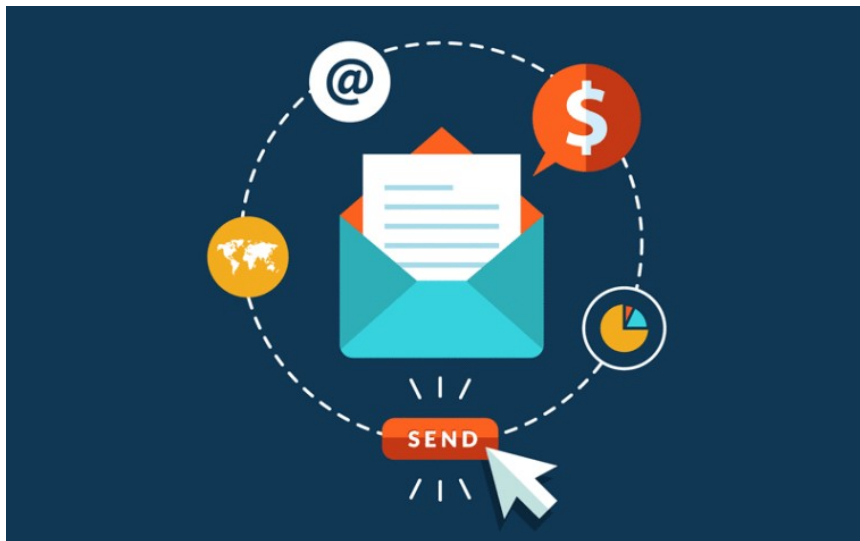


How to Successfully Navigate E-mail Prospecting While Being CASL Compliant



***Starting Today You Can Strategically Use Email to Grow
Your Business in Today's Canadian Marketplace***

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This Special KnowHow™ Report is not meant to be a comprehensive explanation of CASL, nor should it be considered as legal or business advice. For your due diligence, and to learn more about the legislation, visit the Government of Canada’s CASL information site at: www.fightspam.ca.

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“Fail-Safe Best Practices to Successfully Navigate E-mail Prospecting While Being CASL Compliant!”

This Special KnowHow[™] Report will guide you on how to overcome Canada’s Anti-Spam Legislation (CASL) and continue profitable email marketing in today’s thriving Canadian marketplace.

You’ll be given a basic roadmap so as not to be penalized by CASL with Administrative Monetary **Penalties** (AMPs) **fin**es of up to \$1million for individuals and up to \$10 million for corporations per **violation**.

Inside you will soon discover:

1. The Essential Basics of CASL
2. The Obstacles of Building an In-house CASL-compliant Prospect List
3. How to Partner with a Business List Company.

Make no mistake: Whether you’re new to the Canadian Marketplace or a seasoned veteran doing business in Canada... to thrive you must discover the nuances of CASL. Our detailed guide will assist you in discovering how CASL can affect your organization—and the need for you to choose wisely a reputable business list company.



According to Experian 59% of B2B marketers say e-mail is their most effective channel in terms of revenue generation. Learn to correctly harness the power of e-mail marketing so you can increase your leads and boost sales.



SECTION 1: The Nitty-Gritty of CASL

CASL is the Canadian Anti-Spam Legislation. With its wide range, it now includes not only the regulation of e-mail -- but also text messages and social media direct messages.

Playing it safe, you should consider any type of commercial electronic message (CEM) sent to a Canadian electronic address that (according to the law), “encourages participation in commercial activity – even if there’s no expectation of profit.”

Seller beware: The CASL law is all-encompassing and is not just limited in sales pitches. These days just forwarding of your e-newsletter could be considered a CEM – especially if it contains any links to offers or advertising.

Industry Factoid: Research shows half of subscribers are inactive on an email list 4

Imagine, just a soft offer e-mail invite for prospects to visit your trade show booth has ramifications. These days, just the act of handing them your business card is under scrutiny. Regrettably, here’s the reality: *Every segment of your business marketing plan (especially with new prospects) comes under the CASL jurisdiction.*


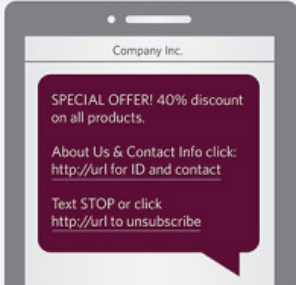


50% of small business owners agree email marketing is effective at engaging existing customers and attracting new customers.

What constitutes a commercial electronic message (CEM)?

Under CASL, a CEM is a message that encourages participation in a commercial activity, including, but not limited to: offering, advertising or promoting a product, a service or a person.

EXAMPLES INCLUDE

<p>EMAIL</p> 	<p>SMS TEXT MESSAGE OR INSTANT MESSAGING</p> 
---	--

Specific conditions apply. Please refer to the Legislation and its Regulations.

And the seismic change in CASL involves that ominous word: *consent*.

In the good old days (before CASL), businesses could simply e-mail prospects as long as you had the disclaimer that gave them the choice of “opting out” or “unsubscribing” from future communications.

And back then that’s all businesses needed.

The mountain has gotten a tad steeper. Presently, you must now first get the consent of the recipient in order to send that person a CEM – **which includes either an express or implied consent.**

Industry Factoid: Research shows half of subscribers are inactive on an email list 4

And both terms have different interpretations. Fair enough, but which type of consent do you have? The one from years ago when a subscriber opted into your newsletter? Because now it gets tricky.



More than half of business achieve 10% of Sales through email marketing and say...

78% of respondents cited retention

70% cited engagement, and

68% cited revenue generation.” 7

For instance: your salesperson meets a prospect at a trade show/conference. Your spanking new prospect hands your rep *their* business card with an e-mail address. Can your company now send that new business contacts an e-mail offer? *Yes, well... "sort of" but a certain criteria must be met. You see...*

Now you must examine what express consent really entails. Express Consent in business requires...

- The sender must clearly describe to the recipient what type of e-mail they'll receive. (E-newsletter, specials sales offer, discount codes etc.)
- Provide full contact information. (Telephone number, mailing and e-mail address, etc.)
- Indicate that the recipient can UNSUBSCRIBE at any time.



"Removing subscribers who have not engaged in over a year instantly increases your deliverability rate by 3 to 5%."

Thankfully, when you fully execute the above requirements you're now in agreement with CASL. As always, when *get their e-mail address express consent lasts until the subscriber says STOP!!*

Of course, Express Consent can also be confusing. Randall Craig, author of *The Everything Guide to Starting an Online Business* and an expert in CASL states: Express consent doesn't necessarily mean *consent to send any e-mail on any topic.*

In this particular scenario you have to describe to your subscriber exactly what particular e-mails they're going to receive. Yes, they have given you express consent to receiving your communications; however, you really have to manage it closely.

How IMPLIED is the Consent?

Now, it gets tricky – although on face value it seems easier to understand. But again, you have to jump through some more hoops. Here are some typical examples of CASL implied consent.

- Prospect went to your website and made a simple inquiry about your products or services.
- Prospect has already made a purchase or signed a contract to purchase products or services.
- Prospect provided your salesperson their e-mail address. BUT that person stated they did NOT wish to receive sales oriented e-mails from your company. Furthermore, the company e-mails they do receive must be specially related to their business or profession.

And yes, in case you're wondering there are other situation where implied consent might not exist as well.

When Implied Consent Ends!

It's certainly a slippery slope when even *implied consent* has an expiration date. Which, by the way, *expires 24 months* after a business contract or subscription ends. That said, some implied consent (refer a friend, request for more information) *expires after 6 months*.

As you can plainly see e-mail marketing is becoming a multi-layered task/head ache for the IT department.

Now, they have to keep track of *active* and *inactive* lists in different company departments.

IT also doesn't want to make the mistake of e-mailing after a contract ends. In many circumstances, IT needs to examine multiple systems (CRM and third party e-mail services—as well as the individual contacts of sales people).

Industry FACTOID!

"Businesses are looking for deeper integration of e-mail with other business functions. The most common barrier to integrating e-mail with overall business strategies is disconnected systems and technology." 6

Warning: PROVE it before CLICKING send!

By now you realize the government is making it harder and harder to do business and keep in contact with your customers.

According to Shaun Brown, co-author of a Complete Guide to e-Marketing Under Canada's Anti-Spam Legislation -- whether it's express or implied consent—businesses must continue to prove consent.

He states, "Any person claiming to have consent bears the burden of proving it. Thus, even if you have consent, consider whether have the ability to prove the existence of consent in response to an enforcement action."

Simply stated, you must have a fail-safe systems in place that allow you gather detailed consent data such as the dates consent was given, the type if e-mails consented to receive, and more.



"On average 69.9% of all e-mail traffic is SPAM!"
"Canada ranks 14th as a distribution of SPAM." 8

Yes, that's easier said than done and that's because this task cannot always be presented electronically. Craig recommends, "...saving event feedback forms, emails, lead forms, etc."

And if it's a verbal consent? Well, it's better to be safe than sorry. *When in doubt always-get-in-writing.*

For smooth sailing, ALL Employees MUST be On Board With E-mail Protocol.

Okay, IT gets the CASL protocol and other in-house employees do as well. But do sales people in the field have to comply with CASL protocol, too? Yes, absolutely.

In fact, the Powers-that-Be at the company have to believe that other staff (like sales people) are also complying with CASL, which is why on-going training is vital.

Even small to mid-size companies have to recognize no matter how difficult it is – for the company's survival it has to be up-to-date on current CASL regulations.

Think your company doesn't have to deal with CASL? (Well, think again!)

Not surprisingly, some ethical marketers are so confident in their business practices they don't give CASL much attention. Their reasoning is they're doing everything by the book, "Hey, we're sending clean offers to our list and we never had a complaint... yet!"

Again, their response is if it does occur. Well, it's like running a yellow light that just turned red. No biggie, everyone does it once in a while!

No doubt, the government wants to instill fear into the Big Bad Spammers. And yet, if you aren't in compliance (even if you're a first time offender) you can be assessed a robust fine. How about up to...

- \$10 million per violation for a company/organization.
- \$ 1 million per violation for an individual (director/officer liability)

And yet, the plot thickens. In July 2017 --- CEM recipients who claim of not giving consent can now sue e-mail marketers. The CASL was created to come down hard on repeat offenders – *but it also sends a message all businesses: Stay Compliant!*

Let's now turn our attention to see ...

SECTION 2



Today's Marketing Challenge: Creating and Nurturing an In-HOUSE CASL Compliant Prospecting List.

Since CASL came to fruition and spread its long dangling tentacles over Canadian businesses, the effects have been severe on all CEMS (which include texts, sound, voice and image).

For instance: an April 2015 study by Cloudmark, Inc. (Cloudmark study) found that there was a **37** percent reduction in Canadian-based spam over the past year. On the flipside, CASL was also perceived (and still is) as having a negative impact upon Canadian competitiveness.

This same study also revealed that a) more than 10 percent of the businesses surveyed have stopped sending commercial e-mail altogether and b) another 30 percent have considerably cut down their distribution lists.

Obviously, with the potential of high fines looming over them, Canadian companies (or any global entity that does business with them), cannot afford to ignore this legislation.

Here's the daily challenge.

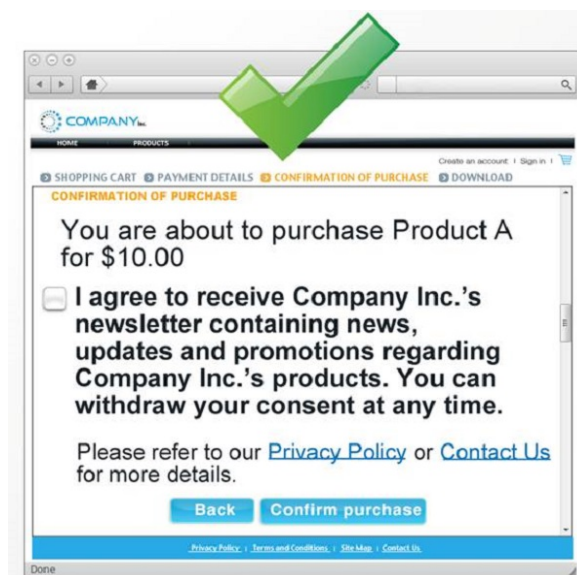
Let's say you're mid-sized Company X. Your IT Department dutifully put together a CRM with customers/ prospects. You also have an outside e-mail provider of email marketing services. Not to mention an in-house team that handles phone inquiries and an outside sales force. Let's now discuss...

7 Ways to Improve CASL Compliant E-mail Marketing

For example, let's once again examine Company X who now has its work cut out for them. *As their in-house list grows they need to heed and focus on systems/best practices:*

1. A CRM system in place that documents all express and implied consent¹
2. Ongoing monitoring to make sure the content plus format stays compliant with CASL
3. Continuous training for sales and customer staff they understand and follow CASL regulations and best practices.
4. A system that integrates prospect information that exists on third-party e-mail marketing databases (i.e Mail Chimp, Constant contact.)
5. A means of keeping updated consent information across all company databases (just in the likely hood a prospect's e-mail is repeated.)
6. A guide in place for recording all consent information provided by phone, internet, which also includes any live interaction with sales staff.
7. A fail-safe system when a prospect/customer's consent expires, do further communication is ceased.

Yes, there are other parts of the CASL that Company X should examine and there's the dilemma. Depending upon their budget, certain companies do NOT have the resources, staff and bandwidth to really to implement such systems. And yet, there are other marketers who focus closely on doing what has to be done to grow and harvest fresh leads and grown their business.



A Recap for Collecting Prospect's Emails, Consent Etc.

Remember; when harvesting prospect emails, you must get...

1. IMPLIED CONSENT

- ✓ Valid Consent is given written/orally
- ✓ Existing Business Relationship
- ✓ Existing Non-Business relationship

2 Express Consent

- ✓ Valid consent given written/orally



2 Disclosed/Noticeably Published Email

Recipient discloses or noticeably publishes their e-mail info, but does NOT indicate or note their desire to receive electronic communication from you.



WARNING: For CASL Compliance best practices dictates YOU *must* take into the consideration ALL of your marketing and sales channels

MARKETING

- ✓ E-Newsletter Subscriptions
- ✓ Web Forms
- ✓ Direct/Marketing Response
- ✓ Social Media Contact

FINANCE

- ✓ Receivables
- ✓ Billing/Invoice
- ✓ Collections
- ✓ Payments/Transfers
- ✓ Public Disclosures

OUTSIDE SALES

- ✓ RFP/Quote Request
- ✓ Sales Meeting
- ✓ Cold Call

TRAINING

- ✓ A privacy officer is needed to supply constant training to existing and new employees.

ROUTINE MAINTENANCE

- ✓ Remove duplicate contracts
- ✓ Add to existing contacts
- ✓ Remove unsubscribed customers
- ✓ Add new contact and updates existing contacts

- ✓ Trade Show/event

INSIDE SALES

- ✓ Upgrades Inquiries
- ✓ Warranty Servicing
 - ✓ Customer Satisfaction

FINANCE

- ✓ Receivables
- ✓ Billing/Invoice
- ✓ Collections
- ✓ Payments/Transfers
- ✓ Public Disclosures

Remember, your marketing and sales department must be on the proverbial same page to be CASL compliant.

Play it safe than sorry. Keep records of mail, e-mails, calls, e-forms, all docs, social media, sms, etc.

Remember, this includes all communications, records – how you obtained them (implied or expressed.) They must be in a format because the burden to prove is on the company.





SECTION 3: Choosing the Right Business List Company

In Direct Mail – the money is in the list! Well, it’s pretty much the same when deciding on how to choose the right Business List Company (BLC) to help grow and nurture your own business.

In a nutshell, a BLC provides vital data on other organizations to help your business with sales, marketing, and research.

Depending upon the List Company/Broker some will give you just names and addresses; while other companies provide even more in depth data: contact names, job titles, sales volume, industry and yes (drum roll) **e-mail addresses!**

United States Companies information
Company Name, Address, Phone , Fax Numbers, Web Sites, Email Addresses, Contact Names and Positions, Description

AK 52,111 with 2770 Emails.csv	11,910 KB	NC 505,273 with 62,803 Emails.csv	131,108 KB
AL 211,223 with 19,222 Emails.csv	54,651 KB	ND 45,720 with 2,371 Emails.csv	12,030 KB
AR 141,157 with 10,596 Emails.csv	36,457 KB	NE 105,502 with 8,405 Emails.csv	27,817 KB
AZ 263,879 with 65,618 Emails.csv	85,139 KB	NH 49,300 with 72,155 Emails.csv	26,453 KB
CA 2,213,697 with 292,920 Emails.csv	579,723 KB	NJ 520,815 with 65,302 Emails.csv	133,133 KB
CO 326,925 with 39,505 Emails.csv	86,808 KB	NM 105,604 with 11,291 Emails.csv	28,495 KB
CT 189,145 with 20,223 Emails.csv	46,987 KB	NY 147,365 with 23,306 Emails.csv	70,314 KB
DC 62,941 with 14,142 Emails.csv	35,215 KB	OH 1,116,827 with 119,776 Emails.csv	296,474 KB
DE 58,071 with 7362 Emails.csv	15,206 KB	OK 623,889 with 55,799 Emails.csv	145,500 KB
FL 1,263,462 with 225,829 Emails.csv	330,774 KB	OR 204,889 with 17,181 Emails.csv	54,623 KB
GA 521,290 with 59,976 Emails.csv	126,383 KB	PA 241,220 with 24,802 Emails.csv	63,261 KB
HI 69,640 with 16,414 Emails.csv	17,173 KB	RI 73,971 with 67,189 Emails.csv	196,760 KB
IA 147,741 with 10,648 Emails.csv	44,076 KB	SC 5,530 with 667 Emails.csv	1,162 KB
ID 91,320 with 10,722 Emails.csv	23,079 KB	SD 63,157 with 7779 Emails.csv	16,164 KB
IL 646,112 with 93,360 Emails.csv	163,714 KB	TN 243,896 with 24,032 Emails.csv	64,561 KB
IN 331,529 with 29,362 Emails.csv	87,362 KB	TX 50,688 with 3,608 Emails.csv	13,280 KB
KS 171,836 with 16,566 Emails.csv	45,200 KB	VA 322,176 with 35,368 Emails.csv	84,955 KB
KY 206,375 with 19,008 Emails.csv	54,622 KB	VT 1,206,618 with 152,628 Emails.csv	246,627 KB
LA 257,822 with 22,438 Emails.csv	67,826 KB	WV 306,059 with 8964 Emails.csv	41,884 KB
ME 434,388 with 47,445 Emails.csv	114,817 KB	WY 126,714 with 21,250 Emails.csv	32,656 KB
MI 249,212 with 50,503 Emails.csv	62,705 KB		119,760 KB
MN 89,832 with 9992 Emails.csv	23,310 KB		12,694 KB
MO 499,895 with 52,461 Emails.csv	125,702 KB		93,658 KB
MS 282,177 with 43,071 Emails.csv	74,516 KB		87,622 KB
MT 357,349 with 35,488 Emails.csv	83,776 KB		21,744 KB
NC 505,273 with 62,803 Emails.csv	36,850 KB		10,838 KB
ND 45,720 with 2,371 Emails.csv	14,528 KB		

Naturally, BLC’s have a vested interest in your company succeeding. Their goal is to provide you safe, legal means for their clients (you) to target prospects via e-mail. This is precisely why when CASL came into being BCL’s put forth capital and resources to learn the legislation. This includes fine tuning their own database, systems and best practices. BLC’s purged old e-mail addresses and kept their list clean and under the strict CASL compliant guidelines!

In essence, you’ve outsourced the hard work to them... so you don’t have to do this in-house!

List Brokering is their business which is why in today’s competitive marketplace they’re a priceless resource for small, to mid-size companies to large corporations.

Remember; with proper e-mail prospecting (and staying within the good graces of CASL) businesses of all sizes can reach new prospects daily and boost their leads, sales and revenue!

The Good, The Bad, the Ugly of BLC's

As you can plainly see – it's imperative that today for a company to not only survive -- but thrive in the digital world, you must choose the right BSL! If you want to generate more leads and sales with e-mail – then ask yourself:

Does the company have a

- ✓ Good reputation
- ✓ CASL-compliant
- ✓ Robust and growing list

Again, this is where you have to do your homework and investigate to see if they're CASL-compliant.

- ✓ Have there been CASL complaints?
- ✓ Do you talk to other companies to get their experience with the company?
- ✓ Are they reputable within your industry?
- ✓ Are they completely up-to-date with **current** CASL Legislation?
- ✓ Have they upgraded their infrastructure, systems, and practices?
- ✓ Are they constantly growing their lists to meet the demand within your industry and marketplace?

Lastly, do they FIT your business's needs with their e-mail addresses/contacts/data?

Remember; with lists a targeted demographic will deliver you the most cost effective and successful ROI e-mail campaign.



"Companies that use email service provider are more likely to be satisfied with their email marketing than companies who do not." 9



SECTION 4: FINAL THOUGHTS + Additional Resources

Let's face it, e-mail is here to stay and is one of the most cost efficient ways to keep in contact with future prospects and customers. It enables your business to build trust and introduce new services and products to the faithful.

And is a strong lead generation tool that can increase sales. And because it's so effective, eliminating it is certainly NOT an option. That said, every company must efficiently harness its power and deal with the necessary evil we call... CASL!

Throughout this Special Report, we have gone into detail showing you the hurdles of building and managing your own own CASL-compliant e-mail list. Yes, it's an arduous task. However, with time, patience and focus any business can do it.

And so it's worth repeating: *When you partner with a CADL-compliant list company you put the odds in your favor of succeeding. Yes, even using CASL compliant best practices -- you can exponentially boost your e-mail prospecting to get optimal results!*



To this day, e-mail marketing remains critical to business. So much so, that 89% of respondents declare email to be 'important' or 'very important' to their organization. 10

The Unvarnished Truth is this... E-MAIL MARKETING WORKS!

Industry studies reveal that using best practices in e-mail marketing is still the preferred communications method for all size businesses.

- ✓ Data is measurable, crossing all metrics
- ✓ Reaches your targeted audience at a relatively low cost-fast!
- ✓ Engage your audience in a more interesting way with links, music, video etc.
- ✓ Offers a much higher ROI than other types of communication.

A CASL Compliant Form

Sign up for our newsletter and receive weekly updates on our company! → Clear description of what the user is signing up for

Name

First name: Olga Last name: Loudinewitch

Email *

Enter email here: olga@bllazen.com

I consent to receiving email notifications from Bllazen (which can be contacted at info@bllazen.com) → Explicit consent to email communications and a way for the user to contact you

By submitting this form you agree to our [terms of service](#) and our [privacy policy](#). → Link to terms of service and privacy policy

Who is Scott's E-mail Service

Scott's Directories is a division of Annex-Newcom L.P., and a leading business list and e-mail marketing service enterprise in Canada.

Due to the recent Canada Anti-Spam Legislation (CASL), Scott's Directories has enhanced their data processing methodologies' and techniques. This is to help their clients access CASL-compliant emails and best practices that exceed CRTC strict guidelines. These added services are designed to help businesses of all sizes to maintain brand awareness, and continued growth. And most of all, to achieve proper CASL e-mail prospecting compliance.

So whether you're looking to generate new leads, build your brand or increase web traffic... **Scott's CASL-Compliant Email Marketing Service** is the solution to achieving your business goals. From simple to complex, Scott's will handle your email campaigns from start to finish – saving you time, money and resources. All while delivering superior e-mail marketing results.



Direct mail has a better response rate than e-mail – 25% vs. 23%, but Direct Mails costs about 100 times as much!"

5 Reasons Scott's CASL- Compliant E-mail Marketing Service Gets Results!

- ❖ **TARGET influential Audiences** – We choose carefully from over 9.6 million high quality executive e-mails. This list targets more than 200 vertical markets and 900 industries.
- ❖ **DESIGN Appealing Emails** – Our team we'll closely with your team to build captivating HTML or text e-mails, newsletters, and triggered email drip campaigns. Our strategies will help promote your brand and optimize conversion.
- ❖ **MEASURE Campaign Results** – *There is no argument with measurability.* After the completed campaign we will examine closely your post campaign Report that measure open rate,

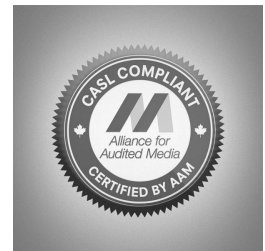
bounces, clicks, opt-outs.

This will allow your in-house team to fine-tune your next campaign.



- ❖ **SEND Responsive Messages** – CASL & CAN-SPAM compliant, we know firsthand how to broadcast your emails at the optimum dates and times to maximize delivery and open rates to ultimately boost your response rate.
- ❖ **CONVERT More Leads** – Scott's E-mail Marketing offers Site Retargeting as well as CRM- Ready Leads. We take the contacts who responded to your email message and follow-up marketing and further sale's messages.

As a respected industry CSAL-Compliant E-mail Marketing Service, Scott's is your one-stop shop. Their focus is to show their clients effective and affordable ways to create brand awareness, increase new business and strengthen current client relationships, all while generating more web traffic to their site.



Need more information? Then please call us at 1-800-408-09431

About Scott's Directories

Scott's Directories is the leading provider of high-value business data and innovative lead generating solutions for the North American B2B community.

Established in 1957, Scott's has empowered organization of all sizes (from local business to Fortune 100 companies) to affordably find, reach and effectively engage their most valuable audiences. The results? Meaningful relationships that grow their business and revenue stream.



In addition, Scott's cutting-edge technology, superior data research techniques plus analytical methodologies delivers the complete spectrum of value-added business data. In addition we provide you direct and digital marketing solutions that help mitigate risk and improve profitability.

Not only can Scott Directories help you and reach your targeted demographics – *but they can help integrate and boost your customer database for more effective communication with them.*

Make Scott's Directors a Partner in YOUR Success

- In-depth Directories
- Data Services
- Email Services
- Customer Contract lists
- Video Service
- Fax Marketing
- Advertising Opportunities
- Custom Publishing

For more info and a customized marketing – please visit us at www.ScottsDirectories.com



Stay Up-to-Date with New Industry Rules & Regulations with Scott's FREE Sale's KnowHow Digital Newsletter! (\$125 Value)



Scott's Sales KnowHow **tm** provides a timely approach to the vital facets within the e-mail industry that can help you thrive and succeed in sales, marketing, tradeshow attendance. We want to provide you the tools for digital stress-free selling in your competitive marketplace. Scott's Digital Newsletter will help with you and your team's productivity and bottom line in the fastest way possible.

Take us for a test drive: Sign up for our Newsletter today and let us show you how we can impact your business and customer relationship

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