



# FINANCIAL ADVISORS Business Development Service

## Best Practise for 'Joint' Clients

The Active Campaign platform we use for all outbound email communication as part of our service (and indeed all similar email marketing systems), is based on the general concept of single email address for a single individual. In other words, every individual contact should have a unique email address in the system.

This approach allows us to personalise the greeting to each contact by using their first name – for example 'Dear Paul' or 'Hi Jane'.

However, in some circumstances you might wish to use a single email address to communicate with more than one individual, for example when writing to a husband and wife. In this case you might want the greeting to be 'Dear Paul and Jane' or something similar.

We have developed a best practise approach for this in Active Campaign as follows:

- We will add a 'Joint Greeting' field to all your Active Campaign accounts.
- If you want communication to any client to be to joint names, you should enter the required value in the 'Joint Greeting' field (for example 'Paul and Jane')
  - We can map this content from your existing databases and/or CRM if you are already storing it – please let us know during the initial set up and configuration phase
- We will update your Active Campaign email templates to make use of the joint greeting, per the following process:
  - If the 'Joint Greeting' field contains a value, that will be displayed as the greeting
  - If the 'Joint Greeting' field does not contain a value, the 'First Name' field will be displayed as the greeting
  - If neither 'Joint Greeting' or 'First Name' fields contain a value then no greeting will be displayed
- As a rule, if you are planning to use the joint greeting approach for clients then you should only set up one contact in Active Campaign for that couple or family, etc., to act as the primary contact and with the joint greeting.

If you have any questions regarding the set-up or approach to joint contacts please don't hesitate to contact Kate via [kate@paulproctor.co.nz](mailto:kate@paulproctor.co.nz)