

CASL: Canadian Anti-Spam Legislation

A Checklist to Help You Prepare & Comply

Canada's Anti-Spam Legislation (CASL) establishes a framework for permission-based marketing, including email marketing, social media marketing, text, and other electronic messaging. Use this checklist as your guide to compliance.

Does CASL apply? If you check both boxes below, CASL applies to your communication.

- Is the message “commercial?”** CASL applies to any message where the intent is to encourage the recipient to participate in a commercial activity.
- Is the message sent to an electronic address?** This includes email accounts, telephone accounts, instant messaging accounts, or any other similar account. (*Live and recorded voice as well as fax messages are excluded from CASL.*)

Know the difference between Implied and Express consent.

Implied – you may only have implied consent if the following apply

- An existing relationship is in place** – with a business or non-business (e.g., volunteer relationship).
- The recipient:** 1) publicly displayed electronic information (email, SMS, social handle, etc.) or 2) disclosed his/her electronic information to sender; **and** didn't ask not to receive messaging; and the message is related to the recipient's business.

Express – exists if the following conditions apply

- Clear notice** was provided to the recipient that they were giving consent.
- That notice **described the purpose of the messages** the recipient will receive.
- The **sender provided the CASL prescribed information.***

Confirm or obtain consent.

- Confirm that you have either express or implied consent to send your messages.** If you didn't explicitly ask for permission or do not have implied consent to mail a contact, you will have to reconfirm their consent.

- Review your process** for collecting and storing recipient information and establish a policy to ensure your data collection method meets and/or exceeds CASL requirements, regardless of the medium.
- Keep records of all information that you collect.**
- Have a reconfirmation strategy** for those contacts that were not collected using CASL requirements. (Remember that CASL provides a 3-year grace period for obtaining express consent.)

Identify yourself by ensuring you've done all of the following:

- Clearly identify your business in all mediums** (email, SMS, IM, social media, etc). Clarity trumps cleverness. Let contacts know exactly who you are and give as many contact options as possible.
- Create clear and consistent “from” lines** to avoid confusion about who is sending the message.
- Create concise and compelling subject lines.** Do not be deceptive about the subject matter and/or content of the communication.
- Include CASL prescribed information*** on all reconfirmation campaigns.

Provide an Unsubscribe Option on all communications!

- Remove opt-out contacts immediately!**
- Test your unsubscribe functionality.** Make sure unsubscribe links work and email addresses provided to unsubscribe are monitored consistently.
- Ensure all unsubscribe links are active for at least 60 days.**

* CASL prescribed information includes the sender's name, address, any one of telephone, email address or web address; and a statement indicating that the person whose consent is sought can withdraw consent.

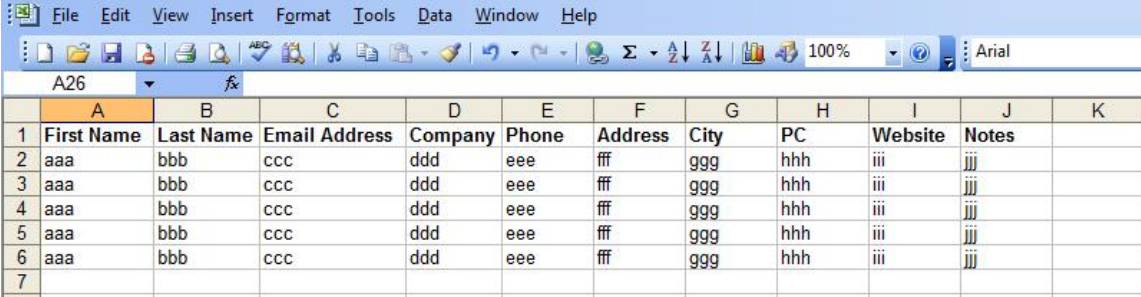
Are you completely compliant?

4 Steps to Starting Your Email Marketing

As entrepreneurs, we are all busy taking care of every aspect of our businesses. If you are like me, it helps to schedule time for projects to ensure that they are completed in a timely manner. If you have been putting off starting your email and social media plan, below are some tips to help you get started. Below are the basic steps you will need to go through to get your email newsletter up and running. To begin, sign up for your trial of Constant Contact through my website www.MarketingMotivator.com

Step 1: Segment and Upload Your Data

Compile your contacts into a spreadsheet with the column headings seen in the example below. If you need help with the organization of your data, feel free to contact me. Setting up your data properly will allow you to send specific messages to different groups at different times. More advanced users can create a “Category” column, and label each record/row according to what lists you would like to send to. Then sort the spreadsheet by the category column. Save each category as its own spreadsheet, then upload to Constant contact to create your distribution lists.



	A	B	C	D	E	F	G	H	I	J	K
1	First Name	Last Name	Email Address	Company	Phone	Address	City	PC	Website	Notes	
2	aaa	bbb	ccc	ddd	eee	fff	ggg	hhh	iii	jjj	
3	aaa	bbb	ccc	ddd	eee	fff	ggg	hhh	iii	jjj	
4	aaa	bbb	ccc	ddd	eee	fff	ggg	hhh	iii	jjj	
5	aaa	bbb	ccc	ddd	eee	fff	ggg	hhh	iii	jjj	
6	aaa	bbb	ccc	ddd	eee	fff	ggg	hhh	iii	jjj	
7											

Step 2: Create Your Template

Set up your template, including your logo, custom banners, website link, and connect to all your social media links. This is the area that clients most often hire me to do. Having this part set-up for you by a professional can really help in moving forward quickly.

Step 3: Develop Your Content

Write your content for your first three email announcements, and schedule them for distribution. Once sent you, your newsletter subject line and a link to your email newsletter will be posted on your social media accounts. Here are some ideas for content:

- a. Introduce your contacts to your new email newsletter format and let them know about the easy unsubscribe link at the bottom of the message.
- b. Send a special offer and links to useful resources.
- c. Feature a successful client project with tips for potential customers.

Step 4: Analytics

Monitor your analytics and make adjustments as needed. Your list will be cleansed over the first few weeks of your new email newsletter, with higher unsubscribes and bounces expected in the beginning. This will even out over time, resulting in a well refined, targeted list.

Whether you need help managing one of the steps, or managing your monthly marketing, I am here to help you. Join accelerated group training and one-on-one coaching. Contact me today to get started FAST!

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