

# Training & Orientation Kit



## Introduction

Welcome to the Swiftpage Reseller Program!

As a Swiftpage Reseller you have the ability to provide Swiftpage's valuable Email Marketing and Marketing Automation features to your clients, and make money doing it! This Reseller Kit was created to walk you through the process of learning about Swiftpage and how to sell it effectively while also fitting Swiftpage service levels with your clients' specific needs. We also can't stress enough the importance of following up with your new Swiftpage accounts and free trials. They may need a little extra help at the beginning, but they're sure to see the value of Email Marketing with Swiftpage after creating and sending their first email.

After studying and reviewing the information provided in this kit, you can take the Reseller Orientation Quiz to qualify for your Swiftpage Account conversion to full complimentary Swiftpage service levels. We value our Resellers and their representation of Swiftpage, so we require you to be informed on all of the materials in this kit before you qualify for Swiftpage Reseller benefits. It's also important to us that you stay up to date on Swiftpage offerings throughout your time as a Reseller. You may be asked in the future to attend a training webinar in order to help you stay informed. We reserve the right to discontinue your complimentary Swiftpage service levels at any time, for various reasons including violation of our spam policy, failure to attend reseller training, or lack of sales for a period of time.

We appreciate your interest in the Swiftpage Reseller Program, and look forward to shared success in the future!



**Quick Tip:** *Swiftpage features available can vary by integration so be sure to notice these differences as described under Integrated Solutions in the footer of the Swiftpage website.*

## Become an E-marketing Expert

Before you can sell Swiftpage, you need to understand Email Marketing laws and best practices. The more familiar you are with E-marketing and Swiftpage's features and benefits, the more likely you'll be successful selling Swiftpage to your clients.



## Learn the Anti-SPAM Laws of the Land

Swiftpage's [no tolerance SPAM policy](#) is clearly stated in the End User Licensing Agreement (EULA) and must be accepted during the creation of a new Swiftpage Account. Under no circumstance should a Swiftpage Reseller agree to the End User Licensing Agreement (EULA) on behalf of a client. Rather, it is the obligation of each unique Swiftpage Account Owner to read, understand, and agree to the End User Licensing Agreement (EULA) before activating their account or sending email with Swiftpage.

The [Federal CAN-SPAM Act](#) was enforced in 2004 and affects nearly everyone who sends email. Swiftpage has a [no tolerance SPAM policy](#) that not only covers the stipulations of the Federal CAN-SPAM Act, but also requires all email addresses are permission based. Permission based means that email addresses have been gathered by means of direct opt-in. Individuals you are emailing must have directly requested information from you or your company. Therefore, every recipient of Swiftpage email should have been clearly and fully notified of the collection and use of his or her email address having consented to such collection and use. This consent is not required to be in writing.

Penalties for violation of the Federal CAN-SPAM Act range from 250 to two million dollars. Violation of the Swiftpage Anti-Spam Policy can lead to termination of service and partnership with Swiftpage. Swiftpage's policy also applies to anyone outside of the United States regardless of the laws for soliciting email in that country.

When collecting and managing your contacts, there are a few main points to keep in mind in order to stay compliant with the CAN SPAM Act and Swiftpage's Anti-Spam Policy:

**Respect your contacts' right to opt-out of your emails.** Once you have contacted your permission based email address list, it is required by law that you allow them to opt-out of your emails at any time.

Swiftpage provides a 'Leave This List' link in the footer of every email and manages your suppression file (list of opt-outs) so you cannot email them again. If your contact emails you to opt-out it is your responsibility to remove them from your list or [email Swiftpage](#) to have them added to our opt-out list.

**Do not email a purchased list of contacts.** There is no such thing as an 'opt-in' list because those contacts did not volunteer to receive communications directly from you. Obtain permission from each person on a purchased list via telephone or direct mail before you email them. Automate this with [Drip Marketing](#).

**Do not pull email addresses from websites or send to general email addresses.** Pulling email addresses from websites is not permission based. Also, refrain from sending to email addresses such as sales@domain.com, info@domain.com, or any other general addresses because they are usually managed by more than one contact and are likely to generate a spam complaint.

**Feel free to contact** current or past customers, contacts who have given you their business card, or those who have signed up to receive your emails.

Here are a few best practices to keep in mind as well:

**Manage your new contacts email preferences.** Would they rather receive your e-newsletter, promotional offering, or only emails specific to their purchase? Respect these preferences to keep them from opting-out if you email them too frequently or your emails are irrelevant to them.

**Keep track of when and how your contacts opted-in** to your communications so that you can prove that they are permission based email addresses in the case of a spam complaint.

**Permission cannot be obtained by anyone other than the email address owner.** A colleague cannot give you permission to send emails to everyone at their company.

**Email your new contacts right away** so they remember opting-in to your communications and don't mismark your message as spam.

**Clean your database.** Follow up with contacts obtained three years ago or more via direct communications such as a telephone call to keep your database accurate and your relationships strong.

## Increase Deliverability

Spam has created the need to implement spam filtering devices. Every email you send will encounter one or more spam filters before it reaches your recipient. Spam filters can mistake legitimate email for spam or junk email. The challenge E-marketers face is having legitimate email messages reach the inbox of intended recipients without being filtered or “junked”. This is the challenge of deliverability.

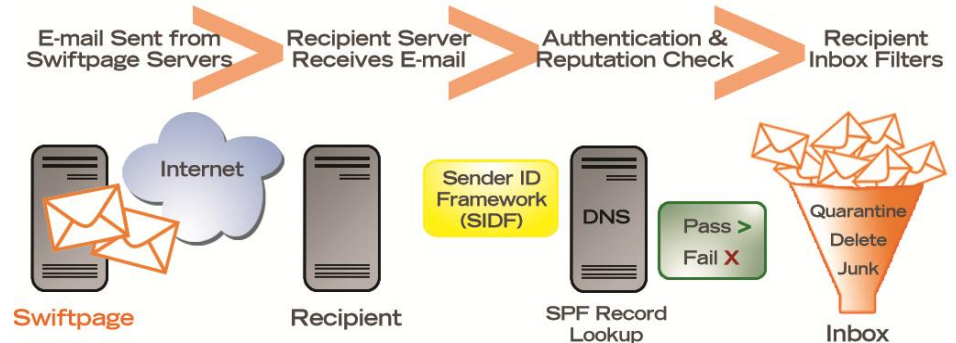
One of the major benefits of Third Party ISPs is their increased deliverability. Swiftpage is firmly rooted in the ability to deliver email. We are constantly looking for new methods to apply regarding how we send email to maintain the best delivery rates. Swiftpage is constantly developing relationships with major Internet Service Providers as well as implementing technical procedures to avoid email filtering and increase deliverability.

**ISP Relationships** One benefit of using Swiftpage is our strong relationships with major ISP’s (Microsoft, Yahoo!, Gmail, AOL, etc.). Swiftpage is proactive about developing and maintaining these relationships to help ensure the deliverability of our customers. For example we work hard to ensure deliverability to AOL customers by maintaining their Whitelist standards.

**Internal Spam Police** Email abuse and spam complaints are taken extremely seriously at Swiftpage. We have full time staff dedicated to researching abuse complaints and maintaining Swiftpage’s “no-spam” standards. This strict policing helps strengthen our deliverability.

## SPF Record Sender Policy

Framework (SPF) is a technical method designed to allow Swiftpage to safely send email on a user’s behalf. Currently, SPF is not frequently used, but is becoming more widely adopted every day. Swiftpage customers interested in using SPF to increase email deliverability fill out [this survey](#) and Swiftpage will send simple instructions to implement it.



**Avoid Spam Filters** The last step in deliverability must be done at the user level. A key component to ensuring your email campaigns make it to the inbox is to follow some basic guidelines when creating your email. Utilize [Swiftpage Spam Check](#) before sending your email, read the [10 Ways to Avoid Spam Filtering](#), watch the [Deliverability Feature Tour](#), and read [Deliverability FAQs](#) to learn more.

Review [Getting Started with Email Marketing](#) presentation and [Your Guide to Email Marketing](#) whitepaper and use them to explain deliverability and email marketing to your clients. Deliverability is a strategic process which your clients will greatly benefit from your consultation. It is a developing challenge that should be monitored consistently. If you have any questions about your list or deliverability please [contact us](#).



## Understanding Swiftpage

Review [Swiftpage Empowering E-marketing](#) presentation in the Reseller Portal and visit [Swiftpage’s website](#) to learn about features and integrations. Study [price lists](#) for service level, Drip Marketing, and customizing information. Learn more by attending demos and exploring the [E-marketing Education Center](#). Study [Feature Comparison](#) brochure available in the Reseller Portal and visit email marketing websites to compare competing services. Notice Swiftpage pricing is by sends per day rather than per month.

## Use Swiftpage Features

Start using Swiftpage to promote your business. Create and send e-newsletters, promotions, or event invitations. Utilize surveys to gather information. View [Live Demos](#) and [Swiftpage’s Blog](#) for tips.

## Get Ready to Sell

Visit the [Reseller Portal](#) and familiarize yourself with the tools available to you. Then be sure to check out Swiftpage Reseller and Swiftpage user Social Media outlets (links found in the Reseller Portal Footer).

### Customer Tracking Landing Pages

These [web pages](#) are listed by integration in the Reseller Portal. Add your Swiftpage Account name to the end of each URL to view your landing page with your logo centered at top. You should drive your clients to the appropriate page to sign up for Swiftpage. These pages were created to link you as the reseller to all accounts that sign up from them.



**Quick Tip:** Your company logo should appear at the top of your landing page. If no logo appears email your company logo and account name to the Reseller Support Agent for updating.

Swiftpage Connect <http://swiftpage.com/partners/partnerconnect.asp?partner=>

Sage E-marketing for ACT! <http://swiftpage.com/partners/semfa.asp?partner=>

Swiftpage for ACT! International <http://www.swiftpage.com/partners/partneractinternational.asp?Partner=>

Swiftpage for ACT! UK <http://www.swiftpage.com/partners/partneractuk.asp?Partner=>

Sage SalesLogix E-marketing <http://swiftpage.com/partners/partnerslx.asp?Partner=>

Swiftpage for SalesLogix <http://www.swiftpage.com/partners/partnerslx.asp?Partner=>

Swiftpage for SageCRM <http://www.swiftpage.com/partners/partnerSageCRM.asp?Partner=>

Bright Peak Creative Services <http://swiftpage.com/partners/partnerbrightpeak.asp?partner=>

Direct Mail – Does not link. Make sure to add ResellerID in Survey Field.  
<http://swiftpage.com/DirectMail/index.htm>

Telemarketing – Does not link. Make sure to add ResellerID in Survey Field.  
<http://swiftpage.com/Telemarketing/index.htm>

### Promotional Text

Since Swiftpage functionality varies for each integration, the following promotional text can be used to describe a specific integration or you can use the 'All Swiftpage' text to describe all that Swiftpage provides. Be sure to consider your audience when selecting promotion text to use on your website, newsletters, promotions, or email signature.

- Summary** (35-41 words) Brief description to give your clients an idea of what Swiftpage offers.
- Basics** (120-155 words) Basic Create, Send, and Track functionality, best for beginner E-marketers.
- Benefits** (190-356 words) Explains the uses of Swiftpage and the features available.
- Features** (238-468 words) Details features and functionality for advanced E-marketers.

**Promotional Imagery**

Banner headers, blocks, icons and skyscrapers are all available by integration or use the 'Basic' imagery for general advertising. Each includes coding and instructions for website placement.



**Provided Email Templates**

Swiftpage Resellers are provided with the following email templates in their Read Only Library. They all start with 'zzz\_SPE\_' and many of the emails are specific to an integration which is listed at the end.

- SEMA – Sage E-Marketing for ACT! powered by Swiftpage for ACT! 2011
- AEM – ACT! E-marketing powered by Swiftpage for ACT! 2010.
- ACT - Swiftpage for ACT! (Applies to any version of ACT!)
- SLX - Swiftpage for SalesLogix.
- CRM – Swiftpage for SageCRM.
- Gen – General Swiftpage – may reference Drip Marketing which is not available for Excel.

- Announce Reseller** Let your contacts know that you resell Swiftpage integrations.
- Basics** Describes create, send, and track capabilities of Swiftpage by integration.
- Benefits** Outlines the uses and features of Swiftpage with more detail.
- Bright Peak** Describes the services offered by Swiftpage's creative division, Bright Peak.
- Franchise** Outlines the Franchise related features and benefits of Swiftpage.
- Free Trial** Keep in touch with your contacts that have started a free trial and push them to purchase.
- Nurture** Create a Drip Marketing campaign for clients that are not ready to buy yet.
- Post Purchase** Thank your clients that recently purchased Swiftpage.
- Purchased Database** Thank your clients for purchasing the database and offer a free trial of Swiftpage.
- Upgrade** Follow up with your clients that have Swiftpage at a low service level and push to upgrade.

**Presentations**

Use these [PowerPoint presentations](#) to demonstrate Swiftpage and Email Marketing to your clients. AEM presentations contain screenshots specific to ACT! E-marketing for ACT! 2010. Feel free to edit any of the presentations to include a final slide with your contact information.

- Getting Started with E-marketing** Third party Email Service Provider benefits.
- Swiftpage Empowering E-marketing** General features and integrations.
- Introducing Bright Peak** Introduction to Bright Peak creative services.
- AEM Email Marketing** Email, Call List, and Marketing Results Tab.
- AEM Surveys and Web Forms** Survey details and functionality for ACT! 2010.
- AEM Drip Marketing** Automated Drip Marketing details and Scenarios.





## Brochures

These informative and branded documents are great to have printed and hand out to your clients. Separated by integration or scenario, see Sales Scenario section of this document for specific uses.

## Pricing PDFs

Detailed Swiftpage and Bright Peak [pricing information](#) is available to print and give to your clients. Please note that Drip Marketing is included in the package pricing for Swiftpage for SalesLogix and SageCRM, but to utilize advanced Drip Marketing features in any other version of Swiftpage, it must be purchased separately.

## Whitepapers

It is a great idea to offer informative whitepaper documents or Swiftpage Articles to prospective clients in exchange for their contact information. Consider offering one of our great documents to your website visitors, you can even use a Swiftpage survey to gather their information for your database.

[Swiftpage Articles](#) A library of articles can be found in the E-marketing Education Center  
[Case Studies](#) Updated often with real situations in which Email Marketing helped businesses  
[Whitepapers](#) Detailed documents on Email Marketing and related topics



## Social Media Outlets

Swiftpage Reseller and Swiftpage User social media outlets provide current updates and great best practices. They're updated frequently so make it a habit to visit them often.

[Reseller Blog](#) Updates and strategy for Resellers.  
[Reseller LinkedIn](#) Forum to request features and discuss.  
[Reseller Facebook](#) Network with other Resellers.  
[Swiftpage Blog](#) Email strategy, feature updates & more.  
[Swiftpage on Twitter](#) Quick updates, news and strategy.  
[Swiftpage on Facebook](#) Network with Swiftpage users.  
[Swiftpage Support on Facebook](#) Get questions answered.  
[Swiftpage on LinkedIn](#) Discuss with Swiftpage users.

## Learn How to Get Credit

Make the most of the tools we provide! Link to your Customer Tracking landing pages frequently so you will automatically be linked to your clients' accounts when they sign up through that page.

**Your Customer Tracking Landing Page** Send your clients to your [customer tracking landing page](#) that best applies to them. They can then sign up to try Swiftpage and you are automatically linked as the Reseller for their account.

**Link Yourself** If you have access to your client's account, add your account name as the reseller in their Account Manager.

**Credit Claim** If the above options are not possible, fill out the [Credit Claim Form](#) in the footer of the Reseller Portal within 6 months of the account's creation to claim your client.

## Keep Us Informed

Update the contact information we have on file for you by filling out the [Reseller Info Update](#) form in the footer of the Reseller Portal.

## Sales Scenarios

When approaching your contacts about Swiftpage it's important to consider their preferences and current knowledge about E-marketing and Swiftpage, as well as the Swiftpage integration that will work best for them. The following Sales Scenarios have been created to help you address your clients and introduce them to Swiftpage effectively. The presentations, brochures, and emails should be provided to your clients in the order listed, and you should consider creating Drip Marketing Campaigns with the emails when multiple addresses are listed. Be sure to segment your contacts according to their integration or use the materials that relate to all integrations.

**Announce Reseller Status** Let all of your clients that may be interested Swiftpage know that you are educated on Email Marketing and Swiftpage by making an announcement and adding Swiftpage to your company materials.

**Main Points** On your website, e-newsletters, business cards and email signature, add Swiftpage imagery, content, and link to your customer tracking landing page. Then segment your contact list based off of the Swiftpage integration that applies to them and announce your Reseller status to them.

**Emails** Reseller Announce for their integration

**Introducing Swiftpage to New E-marketers** Get in touch with your clients that may be interested in Email Marketing but are not yet familiar with it.

**Main Points** Email Marketing is the most cost effective form of direct marketing and an increasingly preferred method of business communication.

**Presentations** Getting Started with E-marketing, Swiftpage Empowering E-marketing

**Brochures** Spam and Delivery Tips, Email Marketing Tips, Swiftpage for their integration

**Emails** Basics by integration

**Purchased ACT!, SalesLogix, SageCRM** Client that has recently purchased one of these database solutions from you but did not purchase Swiftpage.

**Main Points** Thank them for purchasing and introduce them to Swiftpage Free Trial.

**Presentations** Swiftpage Empowering E-marketing, AEM Presentations

**Brochures** Sage E-marketing for ACT!, Sage SalesLogix E-marketing, SageCRM E-marketing Data Sheet

**Emails** Purchased Database for their integration

**Current Stand-alone E-marketing Users** Clients that use Email Marketing and may have a database that Swiftpage integrates with.

**Main Points** Focus on the benefits of integration if they are ACT, SalesLogix or SageCRM users. Note that Swiftpage is less expensive than their current program, and introduce them to Drip Marketing.

**Presentations** Swiftpage Empowering E-marketing, AEM Presentations

**Brochures** Feature Comparison, Swiftpage for their integration, Swiftpage Drip Marketing

**Emails** Benefits by integration, Benefits of Drip Marketing

**Sell Bright Peak Services** Many of your clients want to do Email Marketing but are not designers and don't want to learn how to use Swiftpage editor.

**Main Points** Become familiar with Bright Peak offerings and sell your client on a Bright Peak package for their business. Then complete the Bright Peak project brief.

**Brochures** Bright Peak

**Emails** Bright Peak Creative Services

Want an email  
built just for you?



## Swiftpage for Any Business

For ACT! & Swiftpage Connect solutions you will also want to provide price lists for your clients for service levels and Drip Marketing as necessary.

**Swiftpage for Small Businesses** When meeting with a company with less than 500 contacts.

**Main Points** Offer them Entry or Basic service levels depending on their send limit needs. Be sure to emphasize the benefits of Autoresponder from Survey, Autoloader to Drip Marketing, and introduce them to automation with Drip Marketing.

**Presentations** Getting Started with E-marketing, Swiftpage Empowering E-marketing

**Brochures** Email Marketing Whitepaper, Swiftpage for their integration

**Emails** Basics by integration

**Swiftpage for Mid-Sized Businesses** Best fit for a company with about 500-2,000 contacts.

**Main Points** Offer them Pro service levels with Schedule Send, Call List functionality, multiple users, survey mapping in ACT! and Gold Drip Marketing with multiple stage type options.

**Presentations** Swiftpage Empowering E-marketing, AEM Presentations if applicable

**Brochures** Swiftpage for their integration

**Emails** Benefits by integration

**Swiftpage for Larger Businesses** For your clients with over 2,000 contacts in their database and marketing management needs.

**Main Points** These clients will be best suited with a Team service level for centralized content and distribution, Send As, and Call List Management. In addition recommend Platinum Drip Marketing with Export, Transfer, and Review stages as well as database field filtering in ACT!.

**Presentations** Swiftpage Empowering E-marketing, AEM Presentations

**Brochures** Swiftpage for their integration, Swiftpage Drip Marketing, Automated Marketing Whitepaper

**Emails** Benefits by integration, Benefits of Drip Marketing



**Quick Tip:** When meeting with your clients it is very important to consider their needs and how Swiftpage can fill them. Things to consider include size, functionality requirements, design limitations and automation possibilities.

## Don't Forget to Follow Up

View the quarterly reports you receive from Swiftpage listing the new accounts you've signed up within the last month, and check in with new users and free trial users to help convert your free accounts and maintain your new paid accounts. And with these great resources you can show your clients the many reasons to upgrade!

**Not Ready Yet** Interested in Email Marketing but do not think they need it or do not have time to decide or get started right now.

**Main Points** Push to no risk-free trial and be sure to leave them print materials so they can refer to them when they are ready.

**Presentations** Getting Started with E-Marketing

**Brochures** Email Marketing Tips, Swiftpage for their integration

**Emails** Nurture All 1, 2 and 3

**Converting Free Trials** These clients have started a free trial but you have not heard from them and are not sure they have used it.

**Main Points** Help them create and send an email, add users, show them where to go to attend a demo – these activities are proven to help convert them to paid lasting accounts. Consider informing them of Bright Peak to help jump start their email creation process.

**Presentations** Getting Started with Email Marketing, Swiftpage Empowering E-marketing

**Brochures** Email Marketing Tips, Spam and Delivery Tips, Swiftpage for their integration

**Emails** Free Trial Follow Up, Bright Peak Creative Services

**Upgrade to Pro or Team** Currently using any integration except for SalesLogix or SageCRM at the Entry or Basic service level but may have need for increased functionality.

**Main Points** Inform your current Entry or Basic users of the increased benefits of upgrading to Pro or Team service levels.

**Presentations** Swiftpage Empowering E-marketing, AEM Presentations

**Brochures** Swiftpage for their integration, Price List

**Emails** Upgrade to Pro or Team

**Automate with Drip Marketing** (ACT!, SalesLogix, SageCRM) Clients that have Swiftpage but not Drip Marketing or may not be utilizing the Drip Marketing functionality they have.

**Main Points** Inform them that Automated Marketing saves time and money, while strengthening relationships with clients.

**Presentations** Swiftpage Empowering E-marketing, AEM Drip Marketing Presentation

**Brochures** Drip Marketing Brochure

**Emails** Upgrade to Drip Marketing

**Maintain Client Relationships** Have had Swiftpage for awhile but haven't been in touch lately.

**Main Points** Remember, the longer they're Swiftpage users the longer you make money.

Periodically check in with your clients, see if they're using Swiftpage and if they've had any issues. Then research the E-marketing Education Center to help answer their questions.

**Emails** A direct email from you, your e-newsletter with Swiftpage branding, current Swiftpage promotions to upgrade if applicable

## Consultation Opportunities

As a Swiftpage Reseller you are considered an expert at Email Marketing and Marketing Automation services offered by Swiftpage. Use our free training opportunities to your advantage by offering your clients private training or to strategize and create Email Marketing and Drip marketing campaigns for them.

### Drip Marketing Consulting Opportunities

Sign up to become a Drip Marketing Certified Consultant (DMCC) for free to learn more about Drip Marketing functionality and strategy.

Benefits of certification:

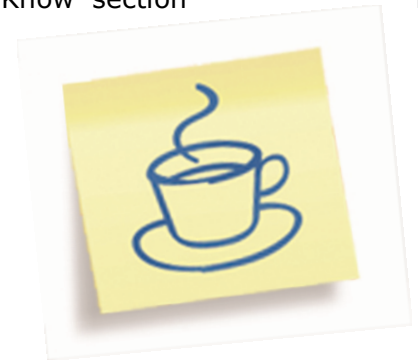
- Free listing on the [Swiftpage website](#)
- DMCC seal to advertise your expertise
- Consultation opportunities
- Provided DMCC specific emails
- Opportunities to [host webinars](#), post on the [Swiftpage user blog](#), and more!

[For more information visit the Reseller Portal >](#)



### Social Media Outlets

Become involved and active in the Reseller and Swiftpage Social Media outlets to gain more knowledge and become better known amongst your peers. See the Reseller Portal 'Know' section for a listing of our Social Media Outlets.



**Quick Tip:** *The more active you are commenting on and contributing to Swiftpage and Email Marketing social media outlets the more exposure you will get to potential consulting clients.*

## Now What?

After you've read through this kit be sure to review the following information:

[Reseller Checklist](#) in the Reseller Portal  
[Reseller Portal](#) and tools available there  
[Swiftpage Website](#) especially pricing and integration differences  
[E-marketing Education Center](#)



Once you feel comfortable with all of the information included and referenced in this kit, you should take the Reseller Orientation Quiz to see if you qualify for a free Swiftpage Reseller account. Email the Reseller Support Agent to request the Reseller Orientation Quiz.

***Quick Tip:** It is important that you understand all of the information provided to Resellers before you take the Quiz as you will not be allowed to take it numerous times if you do not qualify.*

## Contact

### Subscription Requirement

Add the following contacts to your address book and the email addresses to your safe sender list. Please note, to qualify for the Swiftpage Reseller Program **you cannot opt-out or unsubscribe** to any emails you receive from Swiftpage, Swiftpage Reseller Program or Swiftpage's creative division Bright Peak (any email addresses ending in @swiftpage.com or @brightpeak.com). These communications are vital to becoming an informed Reseller and therefore are required to remain in the program.

### Troubleshooting Policy

As a partner with Swiftpage we truly value your expertise in your field and appreciate your consideration when you have general questions regarding Swiftpage. Therefore please do your due-diligence researching this document, the Swiftpage website and E-marketing Education Center before contacting us directly with your questions. If you cannot find an answer in any of these locations, then contact us and we'll be happy to help you.

### Technical Support

Christa Vostrejs, Reseller Support Agent  
[cvostrejs@swiftpage.com](mailto:cvostrejs@swiftpage.com)  
877-228-8377 ext 134  
00 1 303 978 1000 ext 134

### Sales and Marketing

Chris Gordon, Channel Marketing Manager  
[cgordon@swiftpage.com](mailto:cgordon@swiftpage.com)  
877-228-8377 ext 123  
00 1 303 978 1000 ext 123