

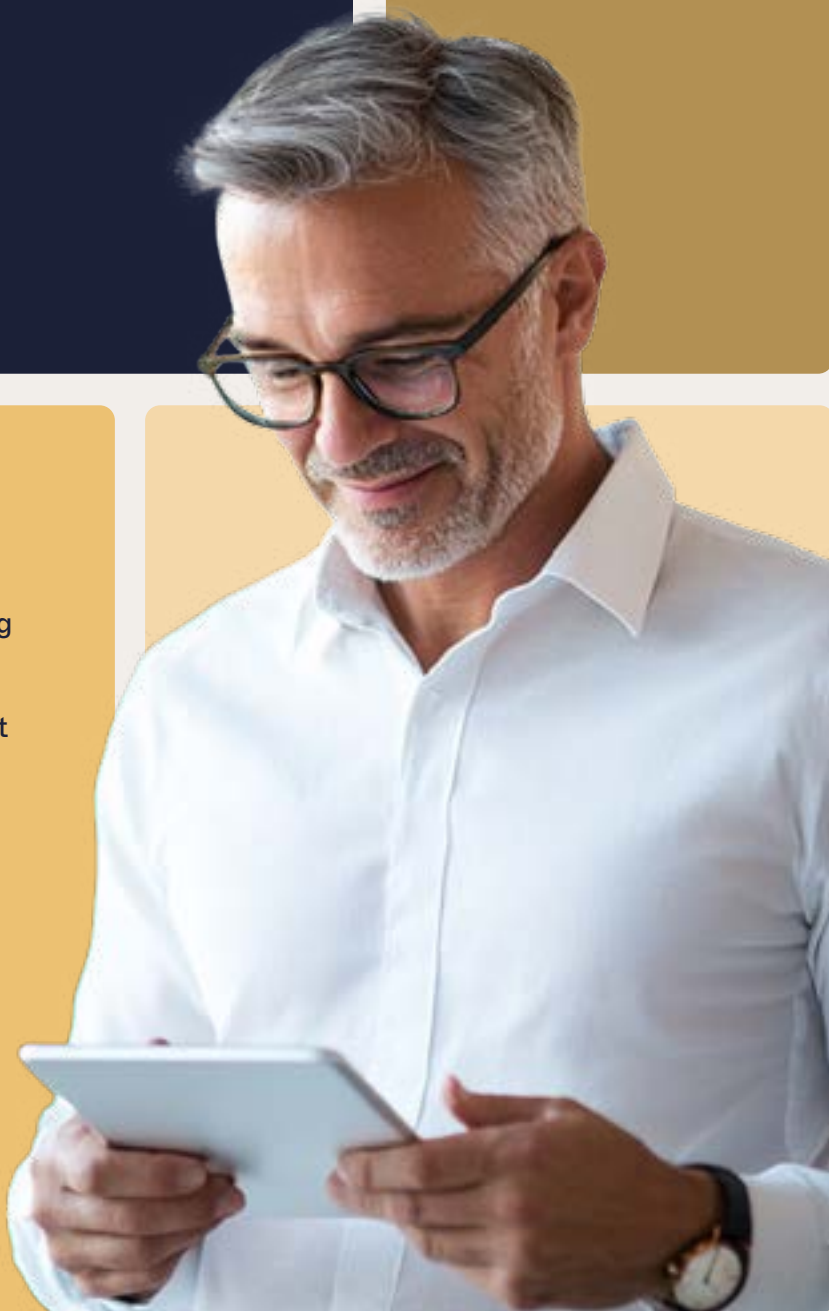
The complete email signature management checklist

Have your email signatures become unmanageable?



As your organization grows, managing email signatures can quickly become a challenge—leading to inconsistent branding, compliance risks, inefficient IT processes, and missed marketing opportunities.

Use this step-by-step checklist to evaluate if your organization needs a dedicated email signature management solution—and what features to prioritize for brand consistency, compliance, IT efficiency, and marketing ROI.



01 Evaluate your current situation

The key signs that you've outgrown manual email signature management:

- Are email signatures inconsistent across users, platforms, or devices?
- Are end users tampering with designs or not making updates correctly?
- Are legal disclaimers missing or outdated in emails?
- Is IT manually updating signatures or handling signature-related support tickets?
- Is the native functionality in platforms like Microsoft 365 and Google Workspace too cumbersome and time-consuming?
- Do signatures break or display incorrectly on mobile or in various email clients?
- Do other teams want to use signatures for more than just contact information?
- Is there a need to automate updates at scale?

02 Define main requirements

Platform capabilities

- Centralized, web-based signature management platform.
- Provides a HTML or WYSIWYG editor for designing signatures.
- Supports major email platforms like Microsoft 365 and Google Workspace.
- Scales to allow for multiple users, domains, business units, or tenants.
- Single sign on (SSO) support.

Directory sync and automation

- Enables directory sync (Entra ID (Azure AD) or Google Directory).
- Applies consistent signatures across all devices and clients.
- Automates deployments and updates for all users.

Security and access controls

Prevents user edits with server-side rendering.

Encrypts messages end-to-end during processing.

Maintains recognized security certifications with (SOC 2, ISO 27001, etc.).

Provides admin-level role-based access controls (RBAC) with secure delegation for non-IT teams.

Guarantees 99.99% uptime.

Compliance

Dynamically applies legal disclaimers based on region or business unit.

Supports regulatory compliance (e.g., GDPR, HIPAA, CCPA).

Supports data residency requirements with region-specific hosting.

Brand consistency

Enforces brand fonts, colors, logos, and layouts.

Applies consistent branding across all template designs.

Customizes role, department, or location-based templates.

Supports headshots, custom social media icons, certifications, and awards.

Incorporates custom brand fonts and icon styling.

User experience

Provides previews of assigned signatures within email clients.

Displays signatures in Sent Items for full transparency.

Allows for user-editable fields (e.g., pronouns, working hours).

Supports multiple signature variations (e.g., new, reply, forward).

Employees can choose from a set of pre-approved designs.

Marketing use cases

Adds targeted promotional banners with clickable CTAs to emails.

Schedules and rotates multiple promotional banners based on timing or events.

Integrates live social feeds for engagement.

Provides the option to place promotional banners above the email body.

Runs account-based marketing (ABM) for specific recipients.

Personalizes campaigns by roles, locations, or departments.

Tailors messages by recipient type, domain, or sales stage.

Collects real-time feedback with one-click surveys.

Tracking and reporting

- Tracks click-through rates for each campaign.
- Analyzes email signature usage and consistency.
- Tracks banner click-through rates by department or campaign.
- Connects with Google Analytics or Power BI.
- Offers real-time alerts for specific interactions.

Advanced integration and attribution

- Integrates with leading CRMs (HubSpot, Salesforce, Microsoft Dynamics).
- Supports embedded meeting scheduling tools (Calendly, Microsoft Bookings, Chili Piper).
- Works with feedback tools (Customer Thermometer).
- Offers custom UTM tagging for campaign attribution.
- Provides APIs or webhooks for deeper integration into internal tools or workflows.

03 Final step

Ready to check every box? Request a demo to see how Exclaimer delivers everything on your checklist—without the complexity.



Get a demo of Exclaimer
to simplify email signature
management.

