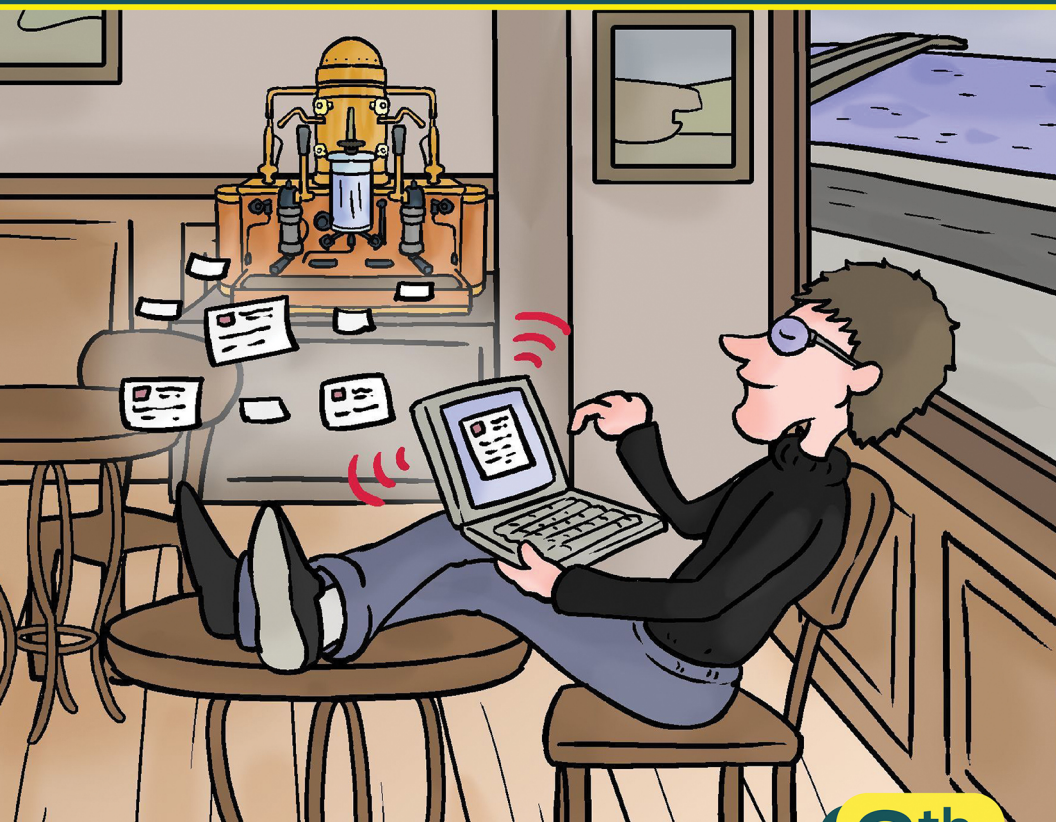




ConversationalGeek®

Conversational Microsoft 365 Email Signatures

By J. Peter Bruzzese (Eight-Time Microsoft MVP)



**In this
book, you
will learn:**

- The importance of uniform email signatures
- Email signature consistency challenges
- Exclaimer's solution for email signatures within Microsoft 365

6th
Edition

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Founded in 2001, Exclaimer provides world-class centralized email signature management solutions. These enable organizations globally, of any size, to achieve brand consistency, legal compliance, and customer engagement on any device. Its solutions for Microsoft 365, Google Workspace, and Microsoft Exchange are used by over 50,000 companies users worldwide in 150+ countries. Its diverse customer base includes renowned international organizations such as Sony, Mattel, UNICEF, AT&T, Bank of America, the BBC, Volvo, Canon, and many more organizations of all sectors and sizes.

Exclaimer solutions are regularly recommended by Microsoft MVPs (Most Valuable Professionals) and have an exceptional reputation within the Microsoft community.

The logo for Exclaimer, featuring the word "exclaimer" in a dark blue, sans-serif font. The letter "x" is stylized with an orange diagonal bar crossing it.

www.exclaimer.com

Conversational Microsoft 365 Email Signatures (6th Edition)

By J. Peter Bruzzese

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Conversational Microsoft 365 Email Signatures

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Publisher Acknowledgments

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Note from the Author

Greetings!

I remember the days when a signature was simply your name and title, perhaps some additional contact information. Using Outlook to control your own signature was easy enough for most. Unfortunately, some took the creativity needle and pushed it off the charts with all sorts of weird fonts, graphics, quotes and such (without any concern for consistency).

At some point the email signature became a representation of the company itself. It therefore became necessary to regulate and make it uniform and consistent. In fact, email signatures are now considered part of the PR and marketing of a company, making the need for a consistent, professional signature a must-have.

In addition, regulation compliance has pushed the need to add disclaimers with the importance of having consistent signatures across devices (desktop vs. mobile). As a result, IT must look to provide uniformity over and above what Outlook could do.

Although there are built-in tools for both Exchange and Microsoft 365's Exchange Online, there are times when a third-party solution may be needed to ensure your company is getting the full value from the signatures your employees send with each and every email correspondence.

J. Peter Bruzzese



The “Conversational” Method

We have two objectives when we create a “Conversational” book: First, to make sure it’s written in a conversational tone so it’s fun and easy to read. Second, to make sure you, the reader, can immediately take what you read and include it in your own conversations (personal or business-focused) with confidence.

These books are meant to increase your understanding of the subject. Terminology, conceptual ideas, trends in the market, and even fringe subject matter are brought together to ensure you can engage your customer, team, co-worker, friend and even the know-it-all Best Buy geek on a level playing field.

“Geek in the Mirror” Boxes

We infuse humor into our books through both cartoons and light banter from the author. When you see one of these boxes, it’s the author stepping outside the dialog to speak directly to you. It might be an anecdote, it might be a personal experience or gut reaction and analysis, it might just be a sarcastic quip, but these “geek in the mirror” boxes are not to be skipped.



Greetings. They call me J. Within these boxes I can share just about anything on the subject at hand. Read 'em!

The Hidden Value of Email Signatures



An email signature, when done right, is of tremendous benefit to organizations. So, it surprises me sometimes when I receive and read an email message wherein the content comes across as professional and then I glance at the signature which screams “amateurish”, “unprofessional” and/or “blah”.

At the same time, I also find that inconsistent email signatures jar my perception of the sender. One moment I get an email that has a signature and the next I get the “Sent from my iPhone” mobile flavor of the email.

I’m not judging folks for stepping out, and I certainly appreciate that they value me enough to email me on the go, but it’s a

combination of the loss of professionalism the signature should provide combined with the TMI factor (i.e. I don't want to know what device you're using unless the real message is 'please forgive all the typos and acronyms... I'm on my phone').

I find I like it when I see a signature with the company logo. I find I dislike it when I see a signature that has a place for the logo, but the jpg didn't come through. Ugh. I'm somewhat on the fence with signatures that contain the Twitter, Facebook, etc. logos, but I am definitely turned off when those graphics don't render.

Key Uniform Email Signature Use Cases

There are three key goals a company should seek to achieve through a uniform email signature:

The Disclaimer: It's common to see these at the bottom of emails with a mixture of language that hits confidentiality, privacy and/or legal concerns. The goal is to limit liability and there are different email disclaimer laws in different parts of the world.



You might think a disclaimer only has to go to external recipients, but this is not accurate. There have been a number of lawsuits that have occurred due to offensive emails that have been sent internally. So, it's important to add an internal disclaimer, albeit one that differs from your external one.

The Professional Impression: Having each individual within an organization present their own "style" in an email signature may not give the image you want. Quotes, personal comments, graphics and so forth may be a display of an employee's 'personality' but are not necessarily professional. Having a

consistent email signature across the organization makes a better impression overall. It helps maintain the professionalism of your brand.

Sales/Marketing Efforts: Should the organization want to promote a current sales offer to prospects and current customers alike, it could utilize all outbound email communications to include details on what's being promoted and next steps to take if interested. The manual approach to these types of efforts is to provide graphics to persons and ask that they add them to their signature (and hope they follow through).

The PR Value: An email signature can be used to convey the value of the brand, how to connect with the organization, promote an upcoming event, and more. Perhaps you want to include social media icons, award logos or other dynamic content. Often times when I have speaking engagements, I will put them in my signature to get the word out. Sometimes I'll use a banner or graphic that links to the event itself. No doubt, your company may have similar events, news, product announcements and so forth that could be spread to a wider audience by simply using employees' email signatures to do it.

But again, this cannot be left up to the whim and will of each end user. You have to ensure it's done right, is centrally manageable, and is consistent from one device and email application to another.

Email is the most common form of communication in any business. It's not only mission critical from the perspective of needing to be available: it's essential that emails coming from your company convey a uniform professionalism and maintain regulatory compliance standards.



Think about it... if your people use PCs, tablets, and mobile devices throughout their day but only the PC email application has a signature, you are not providing a consistent, professional impression. And you're losing out on marketing/PR opportunities in the process.

I read a statistic that says the average employee sends 40 emails daily. So, in a 100-person company that's 4,000 emails every single day! A company can use that high-volume email load as a low-cost marketing tool, but only if they know how.

The hidden value in email signatures can only be unlocked if they aren't left to chance. Consistency (whether in the office or on the road), professional appearance, and uniformity throughout your organization... these are key aspects of email signatures that deliver value.

Challenges of Email Signature Consistency



Centrally managed email signatures are not as easy to establish as you might think. There is a technical side to it, as well as a design element that must be taken into consideration.

Methods for Controlling Email Signatures

I should start by saying that telling your end users to just create their own signatures in Outlook is not an option; this is too important from a corporate perspective to leave it to chance. There are a number of cumbersome and inconsistent methods IT can utilize for creating and managing corporate email signatures.

One-off signatures created by a helpdesk tech is a per-user, per client exercise that IT has no time for. And offering a signature template for users to copy and paste is going to have very mixed results. IT needs to automate this process to address corporate/legal/consistency requirements, as well as ensure a means to easily update signatures without becoming a bottleneck for change requests coming from Legal, Marketing, HR, and Sales.

One automated method is for IT to use *transport rules* within Exchange and/or Microsoft 365 Exchange Online to create basic disclaimers.

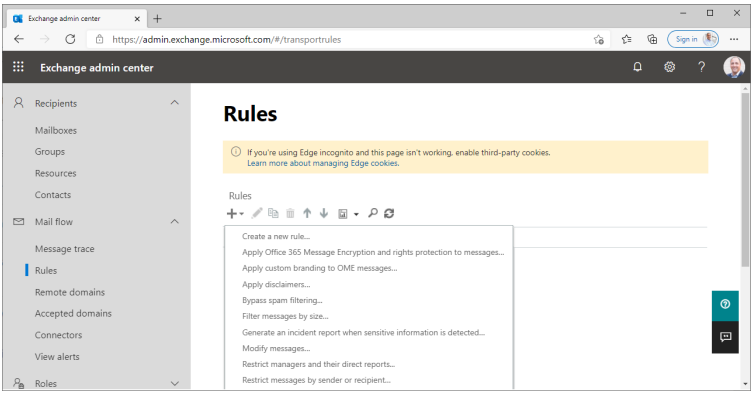
To accomplish this, you need to know how to create a transport rule. It's basically a set of conditions, actions, and exceptions, which are optional. So when a condition is met (say "All email going outside the organization"), an action is taken (say "Append this text" and then insert text) unless this exception applies (say "the disclaimer has already been applied").

It sounds easy enough right? Well, it is if all you're looking to do is add some text to the bottom of every email leaving your organization. To format the text, or include more information in it, you have to use HTML to make it work. The content will also be added at the very bottom of the entire email conversation – not underneath your most recent message, but at the bottom of the whole chain instead.

In the Microsoft 365 dashboard you need to go to your Exchange Admin Center tools. From here you select the ‘mail flow’ feature, and then under ‘rules’ you can create a new rule or simply choose the ‘Apply disclaimers’ template.



A common complaint with transport rule disclaimer signatures is that with replies and such, the signature will continue to get applied each time, but at the bottom of the email chain. You can avoid this by using an exception to examine if the disclaimer text is already applied.



The M365 Exchange Admin Center: Rules Dialog

Images can be inserted but not directly, so you have to point to them on a public website through a link. That means they may not appear in many email clients. Instead, they will appear as red ‘X’ squares until the user clicks to ‘Download additional content’. Additionally, in some email clients these images are interpreted as attachments, eliminating the purpose for including them in the first place.

For a little automatic personalization, you can use special tags to pull in Active Directory attributes of your users and then insert those using double % symbols (like %%displayName%% for their name or %%PhoneNumber%% to insert their number). This, of course, requires that your Active Directory be up-to-date and complete in terms of all user/mailbox attributes – otherwise, you end up with incomplete signatures that look unprofessional.

You can use the transport rules to create multiple disclaimers and set the condition(s) to apply to a specific user or group of users in order to apply different disclaimers to different persons/teams. But this requires quite a bit of effort on the part of an already overworked IT admin.

Built-in Exchange Functionality Limits

Transport rules will certainly work if a simple disclaimer is all you're looking for, but as we discussed earlier, when used properly, email signatures can benefit your organization big time. Uniformity is key, as is a professional look.

When you are working with transport rules to establish basic disclaimer email signatures, there are a variety of important limitations to consider, beyond the extra work involved. For example, the only way to enhance the look of your email signature is through HTML mark-up. Without a visual editor you'll be learning (or re-learning for those of us who have been playing in the IT world since the '90s) HTML.

And what about mobile devices? For example, iOS devices tend to use email clients that send in plain text. If your HTML code is applied to that plain text email, it definitely won't be formatted correctly, and it's possible the recipient will see a block of raw HTML code instead of a signature.

There is no way to test your rule without enabling it and then sending a test email. Again, that's extra work. There are no

templates to choose from to help you with the look and feel of your signature. IT folks are not known to be universally proficient with graphic artistry. Much less proficient enough to make it all come together through HTML. So now you're looking for a graphics person and a web designer who can write solid HTML/CSS to make the signature look polished.

Outlook Cloud Signatures

This SOUNDS like an auto signature competitive solution but it's not. I'll explain why in a moment. What this does is allow a user to set up an email signature and save it in the cloud so that they can hop from one Outlook to the next and apply it.

You see, email signatures are stored locally on the Windows system and stored locally in the registry (which means users have to manually configure their signature settings with each email client). That's fine if you only use one system, or if you don't mind copy/pasting the signature into every system you own and work from. It still does nothing for consistency, nothing to ensure a professional look, etc. Moving that to the cloud will allow subscription-based versions of Outlook (not 2016, 2019, etc.) the ability to set up the signature, and any new installations of Outlook 365 will have those signatures.

To start with only Outlook on Windows will work (and again, only those who are updated with the 365 subscription plan) but eventually iOS/Android Outlook will include it too.



Personally, I use the built-in Mail solution on iOS so this new solution won't exactly give me a consistent email across all devices. In addition, it doesn't provide professional consistency across the entire organization. So while it solves the problem of individual Outlook users having the same signature it doesn't quite address all the other issues.

Auto Signature Products

There are a variety of different ISVs that provide auto signature solutions to attach professionally formatted signatures to internal/outbound messages. These might be in the form of an add-on to your email client (an Outlook add-on/in for example) or through a cloud-based agent that attaches the signature after the message is sent.



For those who are used to physically seeing the attached signature (like it appears in Outlook) a cloud-based auto signature solution takes some getting used to because you don't see it when you hit send.

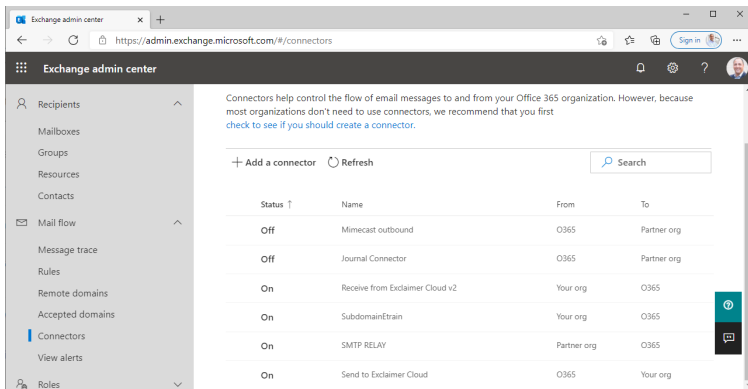
Connectors Assist Microsoft 365

Much like with an on-premises deployment of Exchange, if you wish to add functionality within the mail flow, you need to use third-party solutions and daisy chain these together with connectors.

Inbound and outbound connectors can be quite useful for enhancing the email system (whether on-premises or in the cloud) with security, archiving and more, including email signature support.



On-premises, you can daisy chain multiple solutions together quite easily and without too much concern of added latency. However, one challenge with the cloud is that the more services you daisy chain the greater the email latency and the greater the complexity of the solution, which also adds to the difficulty in troubleshooting.



The M365 Exchange Admin Center: Connectors Dialog

Creating inbound and outbound connectors is not incredibly difficult in Microsoft 365 if you have the proper permissions to do so. To accomplish this, once again, navigate to the Exchange Admin Center. Once you are there, you'll want to find the 'mail flow' feature from the Features pane. Then select the Connectors tab at the top.



From within the Connectors section you can add incoming and outgoing connectors that go to on-premises email servers (like in a hybrid environment), to and from Partner organizations (i.e. business partners and/or service providers), to and from the Internet and so on.

Depending on the direction from the third-party vendor you're working with, you can establish these connectors to alter mail flow with the intent of adding special features to Microsoft 365 (like a signature solution, security solution, archive solution and so on).

The Big Takeaways

Microsoft 365 through Exchange Online does have the ability to provide a measure of email signature uniformity through the use of transport rules (disclaimers) and now Outlook Cloud Signatures. But, beyond the basic inclusion of text, you have to look at using HTML to fancify your signatures and/or look for email signature resources (i.e. pre-built HTML templates) you can use. And although storing signatures in the cloud can help an individual to port their signature from one Outlook to the next it doesn't ensure professional formatting, consistent branding and marketing elements and more.

When compared to third-party email signature tools that provide a visual editor with no IT experience needed, a built-in set of templates and more, you may find you want and need to use an additional solution for your email signature when working with Microsoft 365.



Full disclosure: with all my IT experience and such, when it came time to ensuring my business put its best foot forward and utilized consistent, professional signatures across all devices for everyone in the company, I went to an auto-signature solution.

I went to Exclaimer.

Vendor Sponsor: Exclaimer



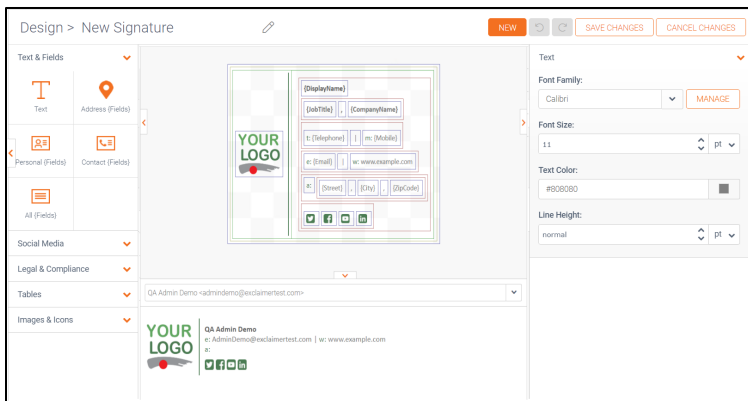
It's safe to say, if you're an IT/Exchange admin, you would love to have a way to not only resolve the email signature uniformity conundrum, but also delegate it to someone else.

Exclaimer does just that. Through a web-based user interface, you can create professional email signatures or delegate the process to someone with absolutely no IT expertise. From a single system, a non-IT user with no HTML skills can design and apply multiple signatures for all Microsoft 365 users.

The person designated to design the signatures will use the web-based UI where they can create email signatures using a drag-and-drop editor, or choose from a range of professional signatures in the template library. Contact details for the users will be pulled from Microsoft 365's Directory for fields like

name, job title, phone number and so on. You'll also have the ability to use custom attributes in signatures, and any fields that aren't populated for a particular user in your directory will automatically be hidden without messing up the design.

The drag-and-drop signature editor allows you to easily add other elements such as logos, promotional banners, user photos, and social media icons.



The Signature Design UI



Once you have it set up, if you need to swap out the event banner or make a change you can make it for everyone at once through the signature editor. And don't even get me started on the value of the Signature Rules Tester! I can test users to see if they send internally/externally exactly what their signature will look like. What a huge time saver rather than saying "ok... let's test it... send an email to my Gmail account" for different users.

Once you've finished creating the signature, you can then apply it based on a number of different criteria:

- Microsoft 365 group membership
- Whether the recipient is internal or external
- Whether the email is a reply or not
- Date/time range
- The sender/recipient domain
- Recipient email address
- Specific user attributes in Active Directory such as job title or country
- Presence of words in the subject line

Multiple users can be given access to your Exclaimer account, and you can assign them either admin or editor permissions. This ensures the correct person deals with the correct signatures, whether that be department or country-specific. This means that you don't have to rely on a single person to manage company-wide signatures.

How Exclaimer Works

Exclaimer is extremely flexible, providing multiple setup options depending on your particular needs.

1. Server-side configuration: Mail flow is configured through connectors to go from Microsoft 365 to Exclaimer's regional Azure servers. The signature is added and then passed back to Microsoft 365 for sending.
2. Client-side only configuration: With this setup, mail flow does not pass through Microsoft Azure. In just a

few clicks within the Microsoft 365 Admin Center, signatures are deployed to your users' Outlook, where they can choose a specific email signature template created in Exclaimer.

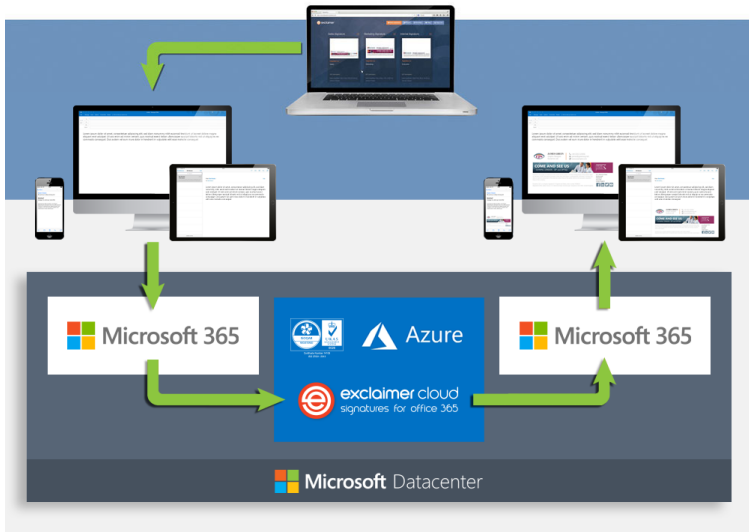
3. Client and server-side (the best of both worlds): Email signatures are deployed to Outlook, and emails are also passed through Azure. This means your users still have the option to choose their signature, and they'll also get signatures stamped on emails sent from mobile devices and Macs.

The Azure Configuration Setup

Exclaimer is hosted within the Microsoft datacenter world (the Azure side). As a result, your Microsoft 365 emails are all processed within the Microsoft Cloud infrastructure.

This is not just comforting from a security perspective and a desire to avoid email tampering; from a latency perspective, having the solutions “near” each other physically and in similar datacenter/network spheres can help reduce excessive latency concerns.

On the Azure side, setup is done so you have a high-availability, load-balanced configuration. The send (outbound) connector will pass the email from Microsoft 365 to a regional Exclaimer Azure server. After the signature is applied, it will use the receive (inbound) connector to pass the email back before it gets sent out.



As for ‘how’ the signature is applied, when the email reaches the Azure server, Exclaimer examines the message ‘envelope’, which includes the sender’s details and intended recipients, determining which signature to apply to the email.

The sender’s attributes are pulled from the cached Azure AD data, which is used to populate the selected signature, e.g. name, job title, phone number, etc. Exclaimer then ascertains where the signature is to be inserted. It decodes the MIME (Multipurpose Internet Mail Extensions)/TNEF (Transport Neutral Encapsulation Format) carrier to do this.

The signature is then inserted in the appropriate location and this new email is sent back to Microsoft 365. It passes through the Receive connector, which forwards the email onto its original recipient/s.

Exclaimer does not save any email content to an external location. This is due to the SMTP mode of integration with Microsoft 365 not requiring emails to be stored prior to being forwarded back to Microsoft 365.

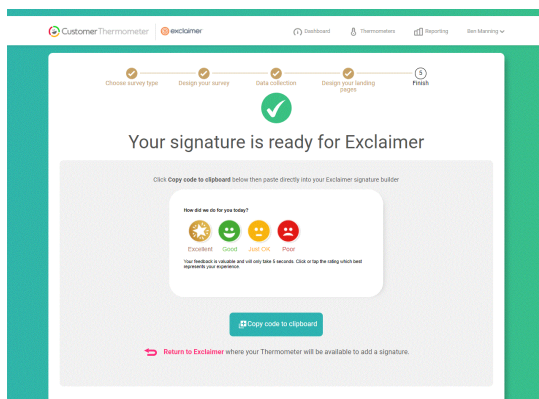
All it does is look for a reply separator in order to apply the signature correctly. It also scans the message body for any unique strings to determine if a signature is already present, i.e. during email conversations.



On a personal level, one of the things I love about Exclaimer is the ability I have to use an internal and external signature. But that's not the best part. When I send an email to persons inside and outside the company, Exclaimer appends the internal signature to my internal people, and external signature to external people. Off the same email I send!

Exclaimer Signature Feedback Power Up

One of the exciting features that Exclaimer offers is the ability to add in a 1-click survey to an email signature template, providing an easy way to gain feedback from the services your company provides. This is a million miles from those long-winded customer surveys that hardly anyone responds to.



Setting up your 1-click survey

Obtaining customer feedback is never easy. Making it a simple 1-click option within an email simplifies the process and allows you to gain insight into the minds of your customers in real-time.

By using universal images like emoticons or stars and embedding them directly into a signature template, customers can quickly provide feedback on their level of satisfaction (i.e. outstanding, good, neutral, and bad). This feedback can then be used to inform all manner of business improvements, including on the customer experience itself.

Exclaimer Signature Appointment Power Up

We've talked about the value of a consistent email signature from a company awareness and marketing perspective. And we've also seen how the extension of a customer feedback solution can also take your email to the next level. Exclaimer has recently added another dimension of value to your email with an easy-to-add appointment setting to your email signatures.

The Signature Appointment Power Up allows users to automatically add "book a meeting with me" options without the need for a third-party calendar system. It connects with Outlook or Google calendars and shows real-time availability that can be configured by the users to ensure the days/time offered are what they prefer.

New appointments are added automatically, and reminders are sent to both the user and the requester through email and SMS. It can integrate with both Teams and Zoom for video conference calls.

The booking link can also be shared outside your signature so you can copy and paste it to send to folks, going beyond the signature link option.

Personally, I love it when I see an option to choose an appointment time with a person I'm looking to talk with. I hate playing phone tag or back and forth "here's my schedule, what's YOUR schedule" games with folks. As a user it's easier for me to choose a day/time. So from a different angle, that of a marketing professional perhaps, or a salesperson, to offer a fast, effortless way for folks to book time with you... that's gold.

Strict Security Maintained

Exclaimer ensures the security of your email and its contents on a number of levels. It starts with support for Microsoft single sign-on to ensure those users managing signatures are who they say they are.

Second, signatures can be grouped together and secured from unauthorized access, making certain they are not tampered with prior to being appended to emails. Lastly, the connectors we spoke of earlier will protect the integrity of the mail flow. SSL certificates and TLS encryption are used to provide a secure connection between Microsoft 365 and Exclaimer.

Data is encrypted using a combination of RSA-2048-bit asymmetric encryption and a one-time use Rijndael symmetric session key. Rijndael is an algorithm selected by the U.S. National Institute of Standards and Technology (NIST) as the Advanced Encryption Standard (AES). Keys issued are managed through certificates, with several of these being used for encipherment (converting a message into a cipher for encryption and decryption) purposes.

When Exclaimer processes an email, it examines the message to decipher the sender's details so it can apply the relevant signature as configured within the UI. It also scans the mail for common strings that represent a reply separator, so the signature can be inserted in the correct location.

Exclaimer does not actually ‘read’ the message in the traditional sense, and the email content is not saved (persisted to disk) or available to Exclaimer personnel.

Overall, because the email stays in the Microsoft Cloud loop – and because proper connector protocols are used to ensure security – email is not compromised at rest, nor is it able to be compromised in transit through the signature “stamping” process.

Worldwide Availability

Exclaimer is hosted in 12+ regional Microsoft Azure locations globally. Each region has a primary and secondary datacenter, ensuring your mail flow is constant, even in the rare event of an issue occurring in the primary datacenter.

The ISO/IEC 27001 Certification

Exclaimer has achieved the ISO/IEC 27001 Certification for Information Security Management, which was awarded by the BSI (British Standards Institution), the gold standard for ISO compliance requirements. The ISO 27001:2013 Certification means a third-party accredited independent auditor has performed a thorough assessment and has confirmed it is operating in alignment with ISO cloud standards.



**THESE
SIGNATURES
ARE
GIVING
ME A
HEADACHE!**



Choose the pain-free way of
managing email signatures

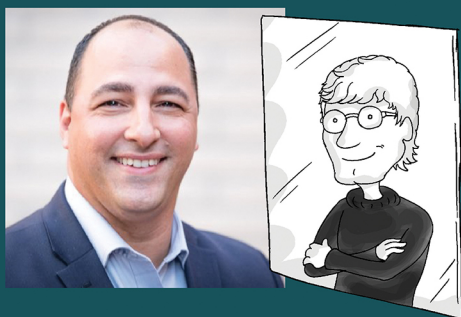
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Quickly become conversational about Microsoft 365 email signatures.

If you're moving to, or are already on, Microsoft 365, it's essential to understand the value of email signature consistency and the possible ways of achieving such uniformity, as there are built-in methods that provide less-than-stellar results. In this book, we cover the why and how to achieve consistent email signatures within Microsoft 365.



About J. Peter Bruzzese

J. Peter, an eight-time Microsoft MVP awardee (Exchange/Office365), is an internationally-recognized journalist, published author, and speaker. He is co-founder of both Conversational Geek and ClipTraining. Follow him on Twitter @JPBruzzese.



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