5 Ways to Make the Most of Marketing Automation

GrowthZone
smarter association software

Overview

One of your key needs as an association may be ongoing, relevant communication with your members and prospects…

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With Marketing Automation, you can send personalized, targeted information to bring the most valuable information to your stakeholders.

You can assign contacts into one or more groups based on their information, interests or actions and have a defined flow of communication that occurs based on that information.

- For instance, you can add all new members to a first- year member workflow where the information they receive is targeted around that first year experience and key milestones that will ensure a successful onboarding

5 Ways...

1.. Gain Efficiencies by setting up "Repeatable" campaigns

2...Setup Custom Messaging for Targeted Lists of Contacts

3... Send Emails at Just the Right Time

4... Add logic

5... Track and Keep Everyone on track
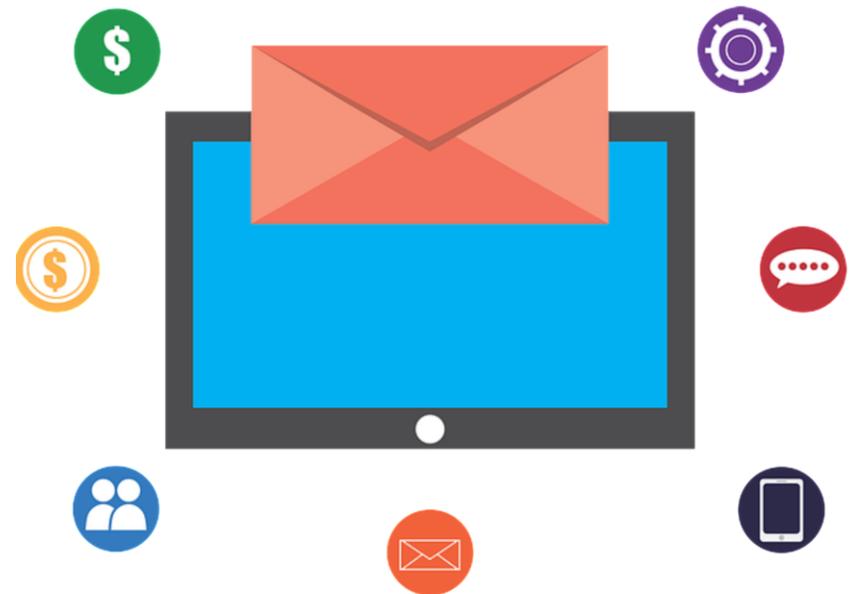
1…Gain efficiencies by building "Repeatable Campaigns"

"Repeatable" campaigns can be designed through the marketing automation module, then used over and over to save you time

For example, you may have a series of emails that you send to new members – by setting up this work flow, you will simply add the new member to the workflow group and let the system take over from there…

NOTE: Once a contact has gone through the workflow, they will NOT be able to go back through it
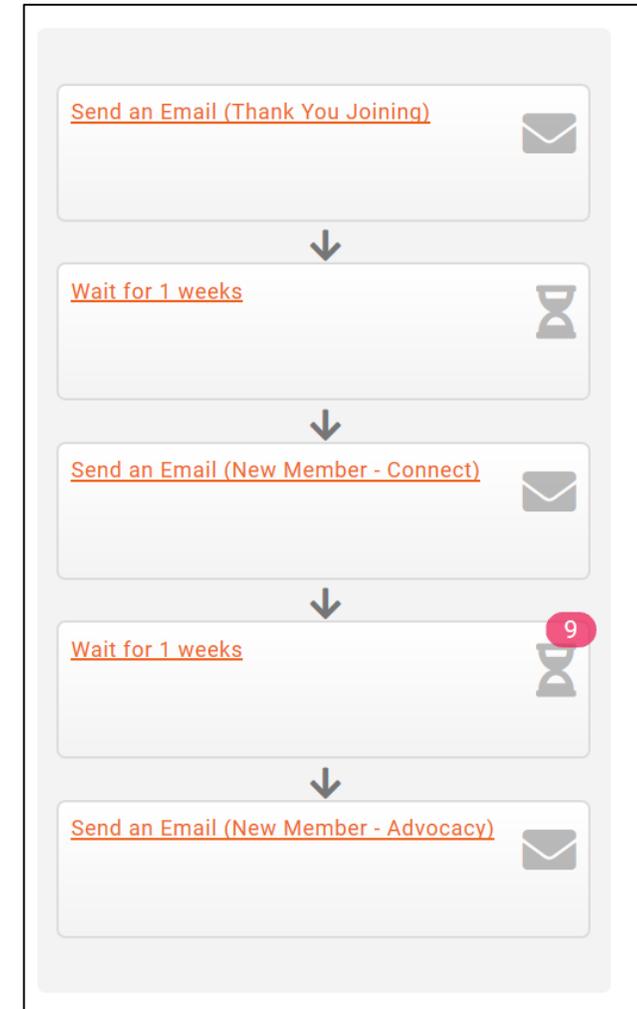
2…Custom Messaging for Targeted Lists of Contacts

Create lists of participants that you would like to include in your drip campaign…

2...Custom Messaging for Targeted Lists of Contacts

Examples:
- New Members
- Exhibitor Leads
- Prospective Members

WIKI: Working with Lists/Committees

2...Custom Messaging for Targeted Lists of Contacts

Build a communication drip campaign by defining specific emails that will be sent under this program
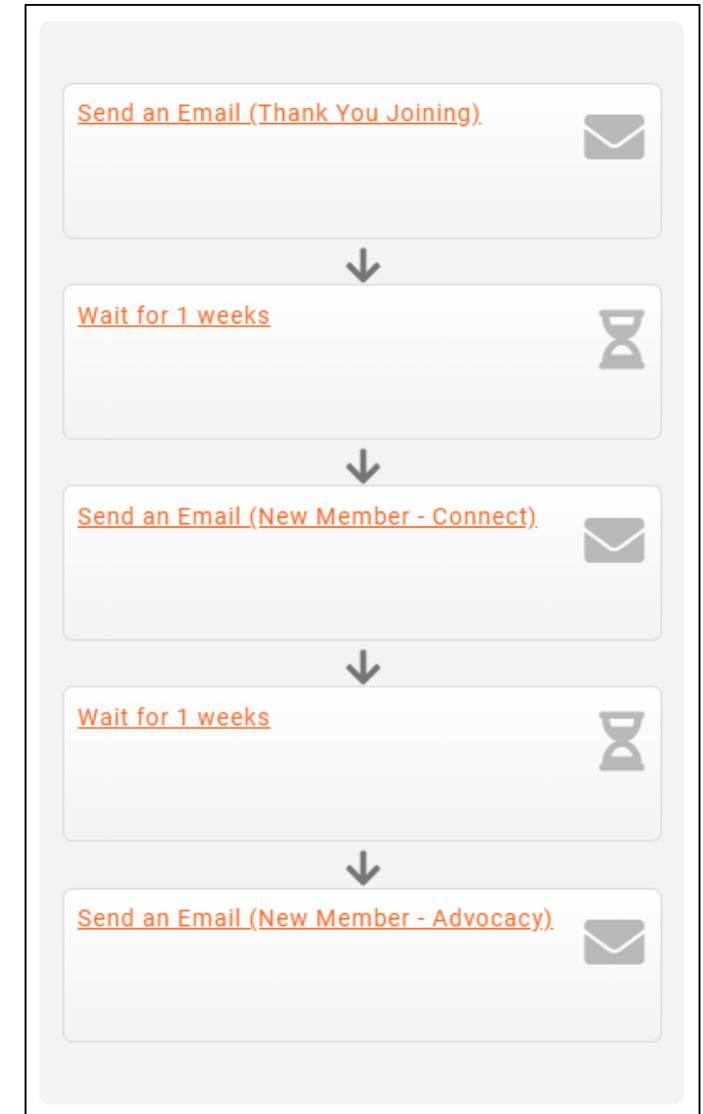
WIKI: Setup your email templates

New Member - Advocacy		Member Communication	✎	✖
New Member - Connect		Member Communication	✎	✖
New Member - Engage		Member Communication	✎	✖
New Member - Thank You Joining		Member Communication	✎	✖

3... Send Emails at Just the Right Time

Define the sequence of the communication and time between each communication

- For example, you may send the first email "Thank You for Joining" on the day the member joins, then send on of your follow-up emails each week

WIKI: Setup Your Workflow Automation Steps

Send an Email (Thank You Joining)

↓

Wait for 1 weeks

↓

Send an Email (New Member - Connect)

↓

Wait for 1 weeks

↓

Send an Email (New Member - Advocacy)

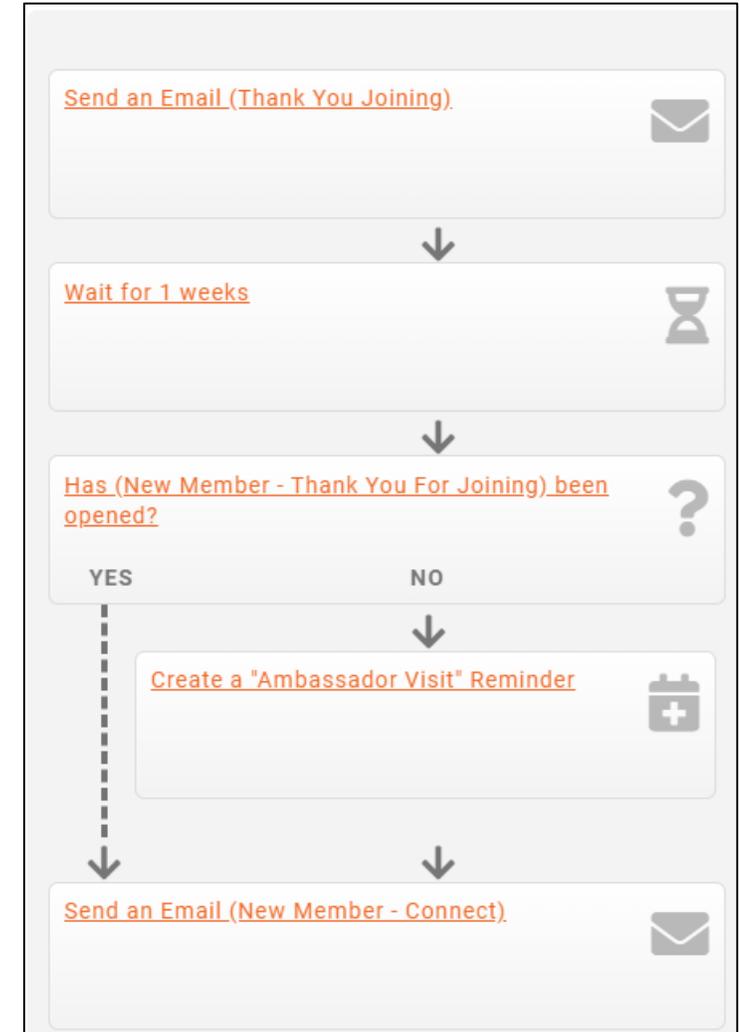# 4… Add Logic

What if they don't open an email???
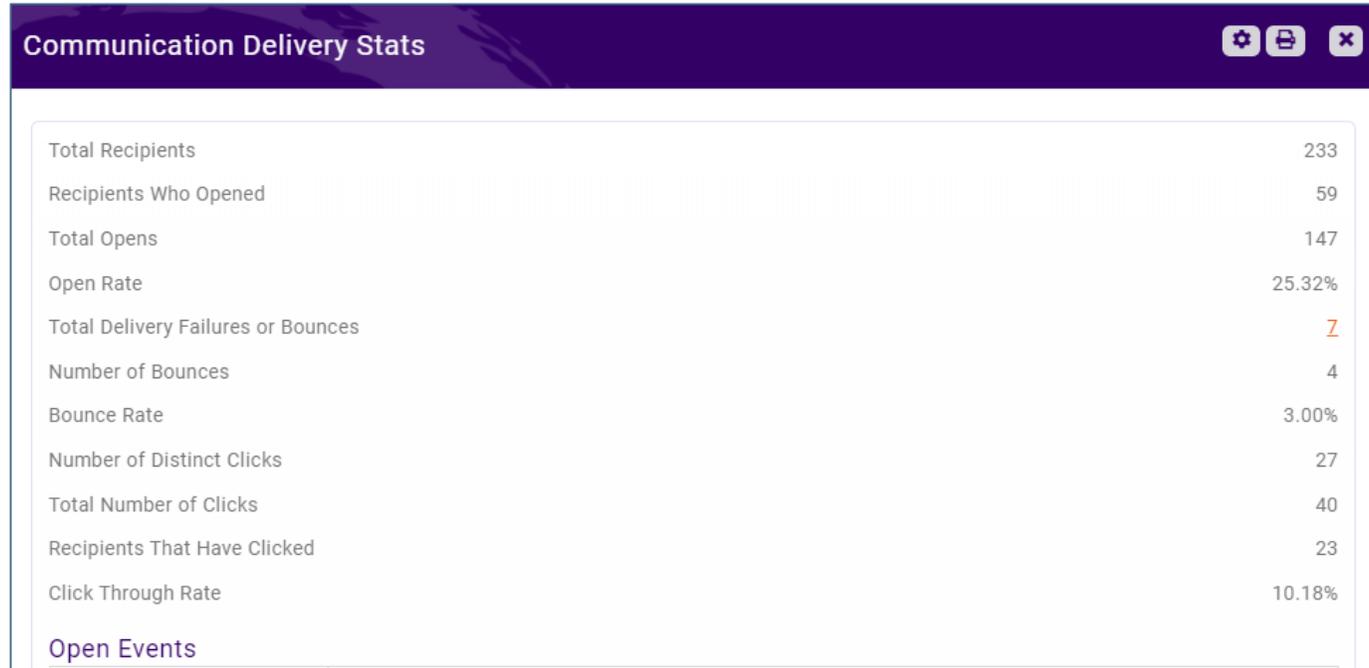
- Add logic that will allow you to take a different course of action if an email has not been opened…

WIKI: Definitions of Workflow Steps

4... Add Logic

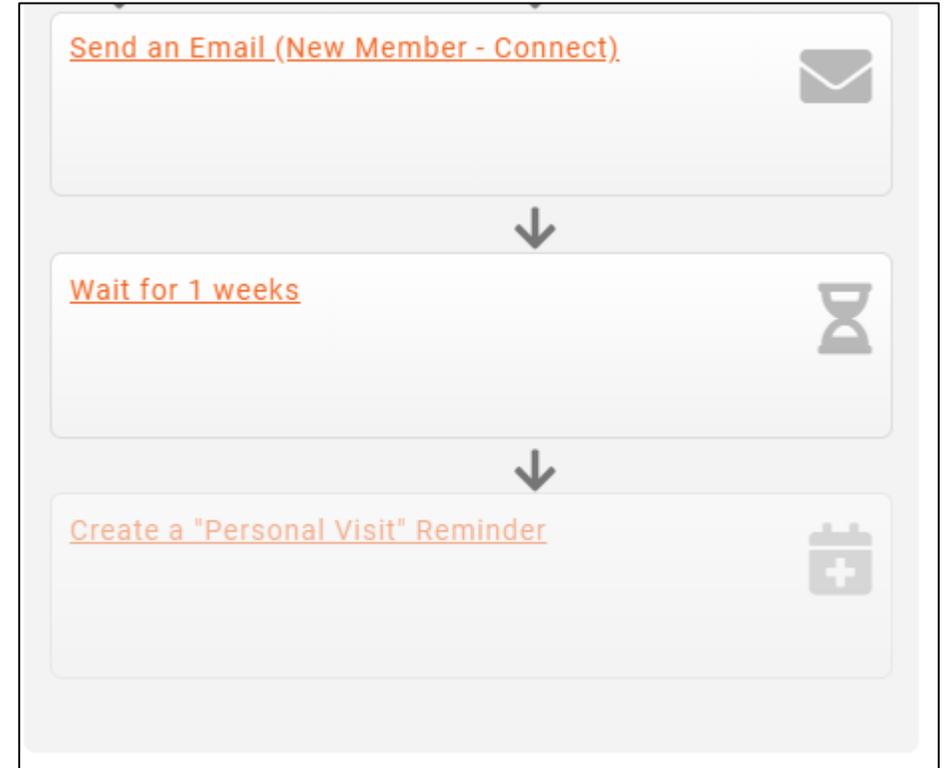Did you know... new email delivery statistics are available!

WIKI: View all Delivery Stats

5… Track and Keep everyone on track

Your nurturing program may not just be emails, but personal visits from your staff… you can include those steps in your workflow AND ensure that a reminder is sent to the staff members!

WIKI: Definitions of Workflow Steps
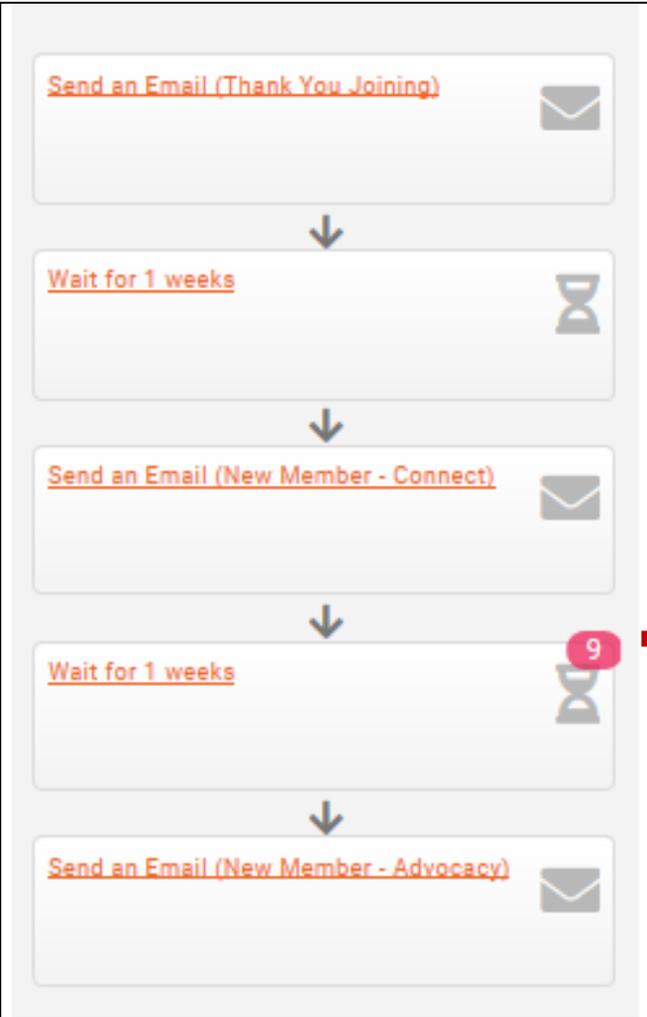
5… Track and Keep everyone on track

You will also track, and see at a glance which of your contacts is in which step of the workflow…
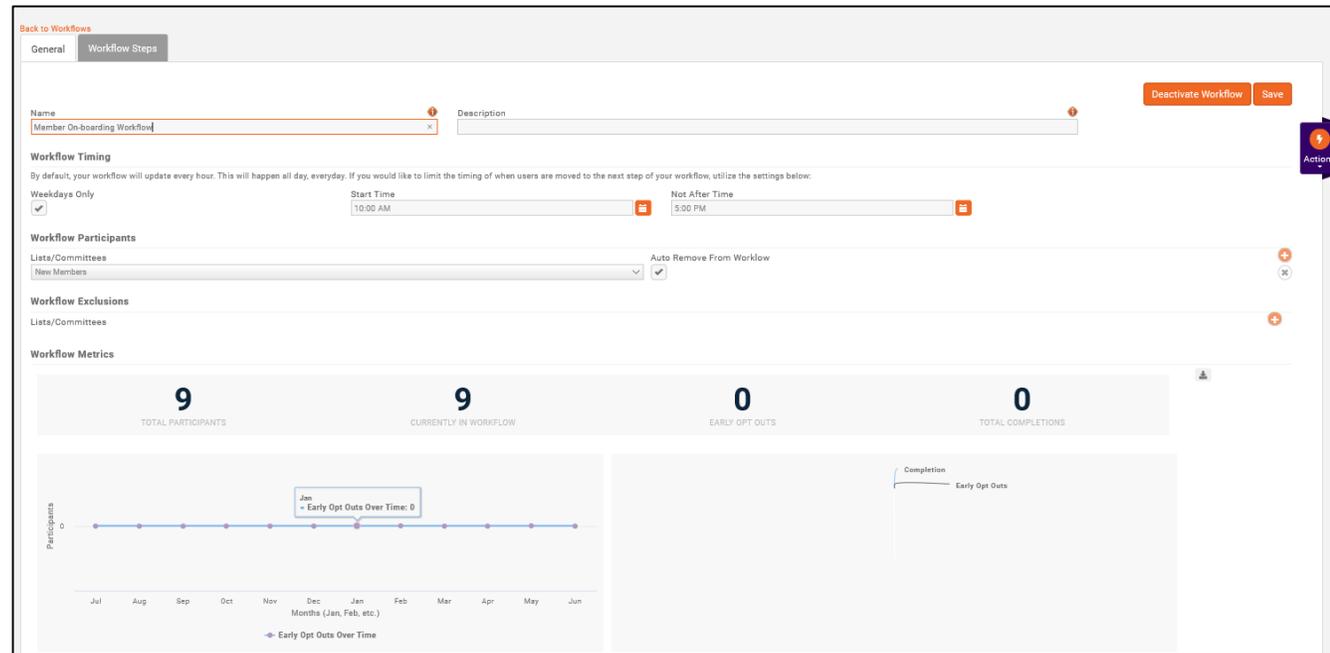
WIKI: Workflow Metrics

5... Track and Keep Everyone on track

Why use Marketing Automations? It is an excellent way to reach out to your contacts and automate time-consuming, demanding, or delicate manual tasks which otherwise could incur mistakes

Questions?