GrowthZone Classroom Training: Marketing Automation

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5 BEST PRACTICES FOR MARKETING AUTOMATION

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Marketing Automation

Best Practices: Know Your Goal

Identify small goals for each workflow. Use these goals as stepping stones to accomplish bigger, long-term goals.

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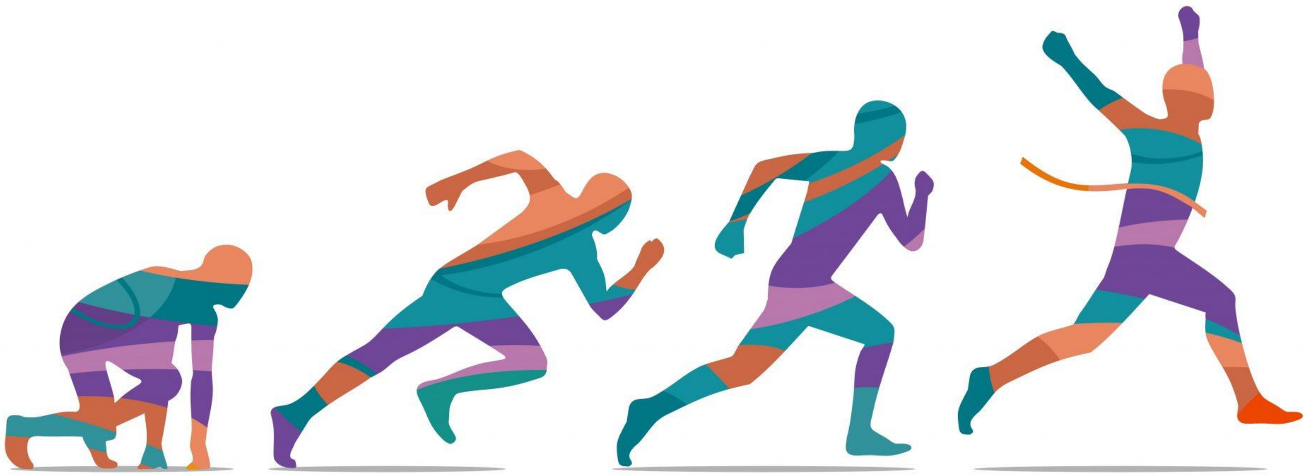

Best Practices: Know Your Goal

Ensure the email content makes sense and delivers a call to action, given what the workflow sets out to accomplish. Assign a workflow start and end event accordingly.

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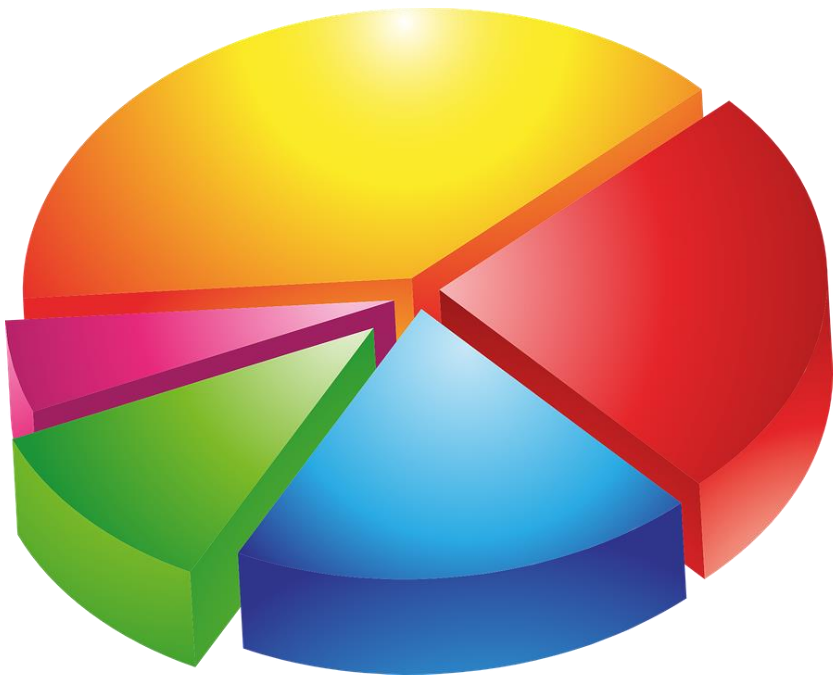
Best Practices: Target Your Audience



Your database will likely have several segments of contacts. For example:

- Prospects
- Leads
- Members
- Former Members
- Event Attendees
- Board of Directors
- Etc.

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Best Practices: Target Your Audience

Once you determine to whom your campaign is directed, create relevant, appropriate, engaging content for your audience.

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Best Practices: Make it Engaging

From a Person: Relationships are between people. Send all your emails as though they were from you (or a staff member) personally!

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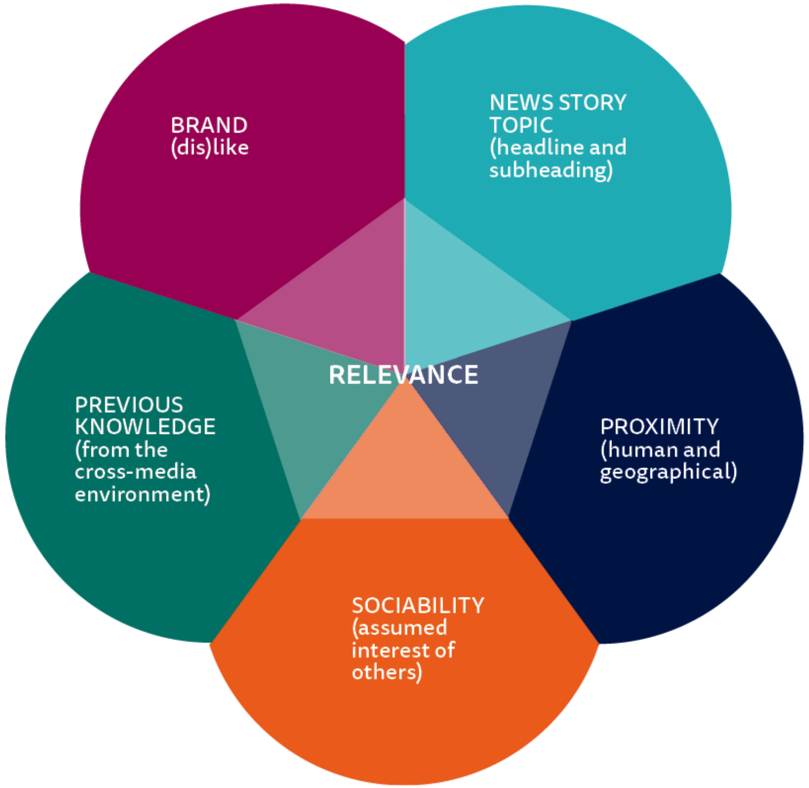
Best Practices: Make it Engaging

Content: Make it valuable to your selected audience. In order to resonate with the audience, the emails must speak to their needs.



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Best Practices: Make it Engaging

Readability: Keep emails short. If they do need to be longer, limit paragraphs to 2-3 sentences, ask questions on one line, put important things in bold or on their own line, and use as much white space as possible. It will keep the eye moving.

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Best Practices: Timing is Everything

Strategically send out emails according to the goal of the workflow and the stage of the member.

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Best Practices: Timing is Everything

Onboarding a new member? Send several emails quickly to take advantage of their excitement.

Existing members can usually wait a bit longer between emails.

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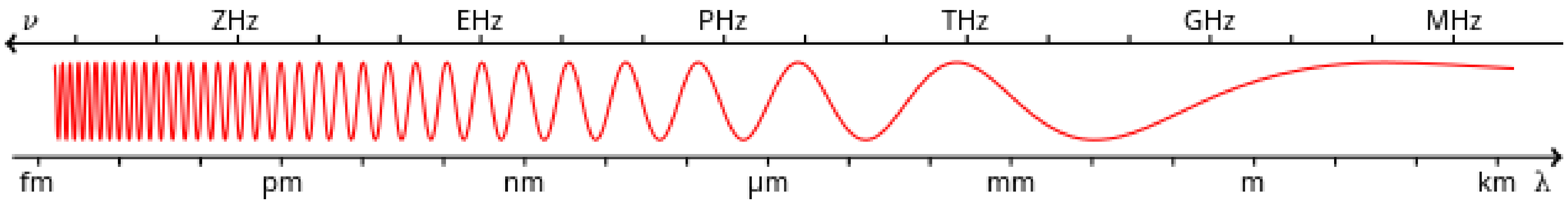
Best Practices: Timing is Everything

Over time, once they've engaged, you can space out communications more widely.



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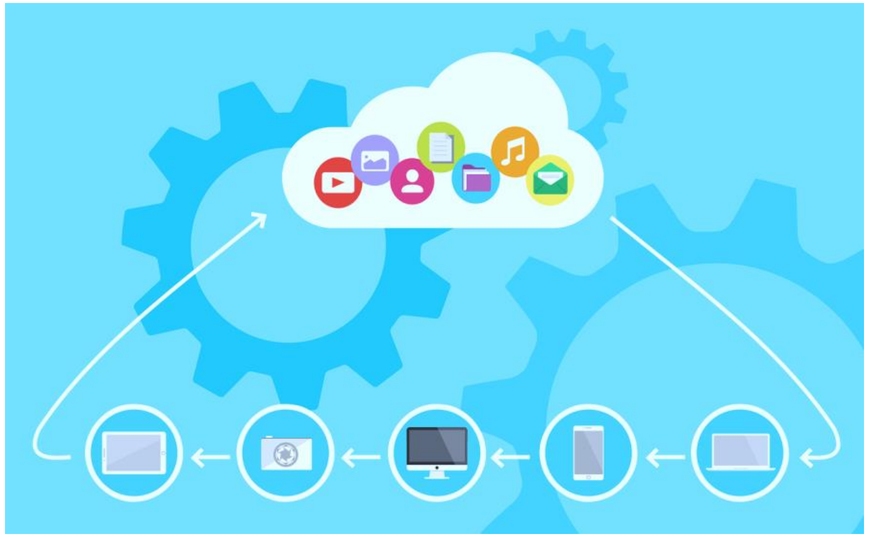
Best Practices: Call to Action

You have a catchy subject and relevant, engaging content. Your audience is excited about what you have to say, and they are ready to respond…



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Best Practices: Call to Action

Make sure to include a call to action to guide their next decision. Ask to complete a short survey or follow a link for more options or information.

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SET UP A NEW MEMBER ONBOARDING WORKFLOW

Set Up a New Member Onboarding Workflow

Your new members are hopefully excited about their membership and your organization! Leverage that excitement by sending them a series of communications about your organization and their benefits, to get them on the fast track to being engaged members.

Before You Start…

What's your plan for onboarding new members look like? Do you have one? Putting a plan in place is the first step toward a successful onboarding- and is crucial to member retention.

Any plan- even a simple one- is better than no plan.

GrowthZone New Member Onboarding Plan

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Before You Start…

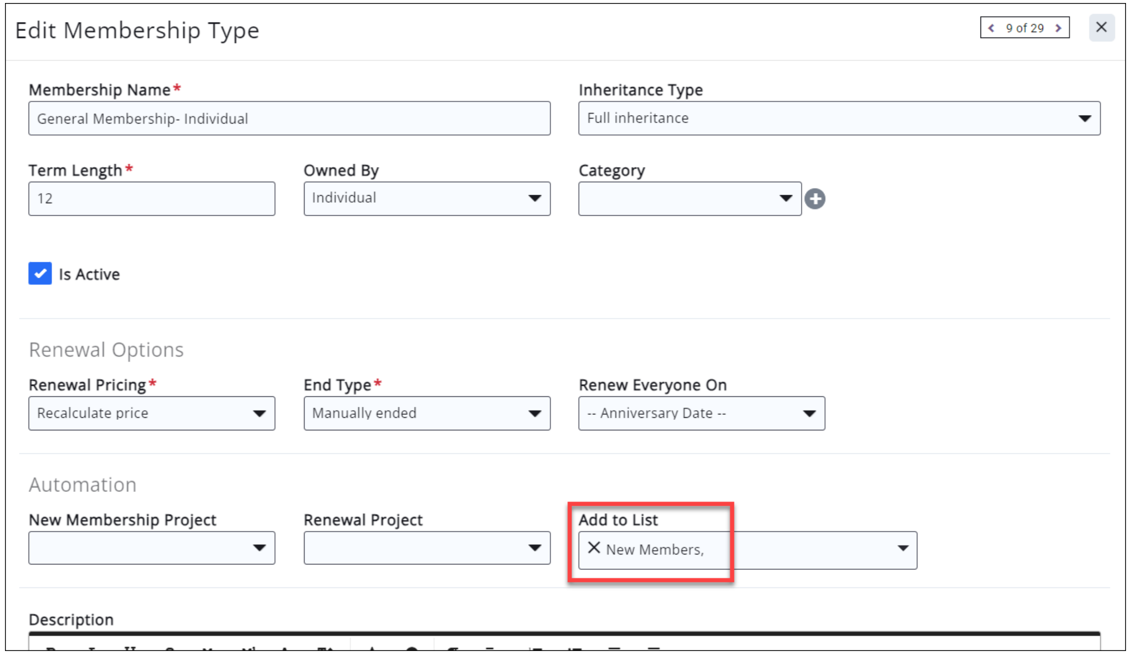
Before setting up your email workflows within the Marketing Automation module, you'll need to:

- Create the desired email templates to be used in your campaign. See Create and Manage Email Templates.
- Set up reports as needed to feed into your designated lists/committees. See Save a Report as a New Report.
- Create the desired lists/committees. See Working with Lists/Committees.

Set Up a New Member Onboarding Workflow

You can set your memberships to automatically add new members to a selected list- and then use that list as the source for your workflow.

Article: [Populate a List/Committee Roster from Membership Activation]()



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Set Up a New Member Onboarding Workflow

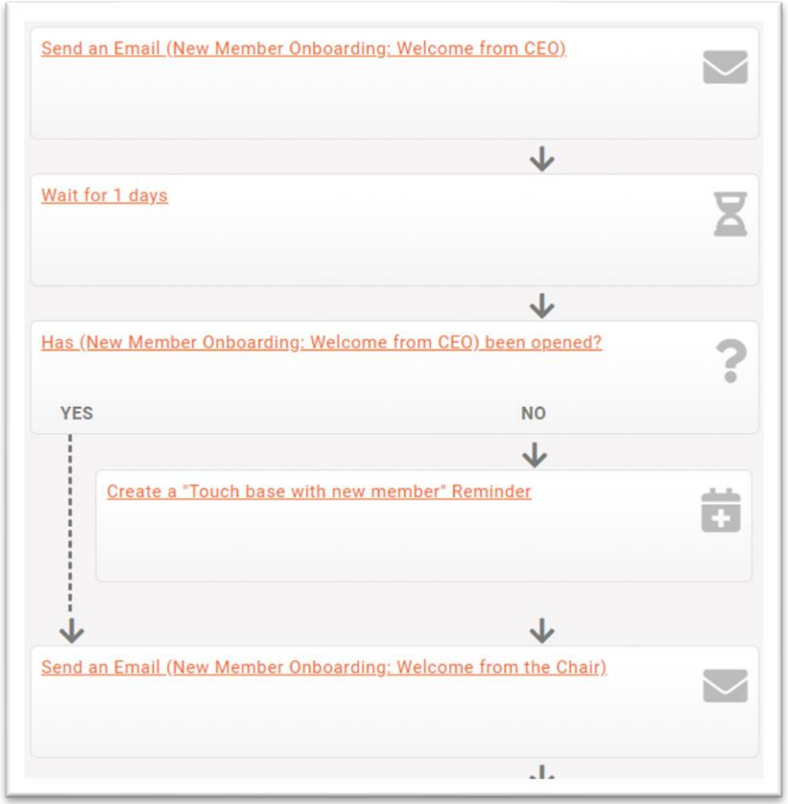
Example Workflow: New Member Onboarding

Goal:
Create advocates who renew!

Audience:
New members

Content:
Benefits, networking, support

Actions:
Engagement, events, representation



Set Up a New Member Onboarding Workflow

Let's get started!

- Creating a new Workflow
- Add Steps to Your Workflow
- Definitions of Workflow Step Types
- Logic Branch Options
- Save/Activate/Deactivate Your Workflow

THANK YOU!!!

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