

Marketing Automation: Overview



Agenda

Overview of Marketing Automation

Capabilities

Prep and Plan

Let's Set Up Some Workflows for Form Responses!

- Workflow for Contacts who have completed the form
- Workflow for Contacts who have not responded

Overview

One of your key goals as an association should be ongoing, relevant communication with your members and prospects. The Marketing Automation module is designed to reach out to your contacts and automate time-consuming, demanding, or repetitive manual tasks regarding those communications.



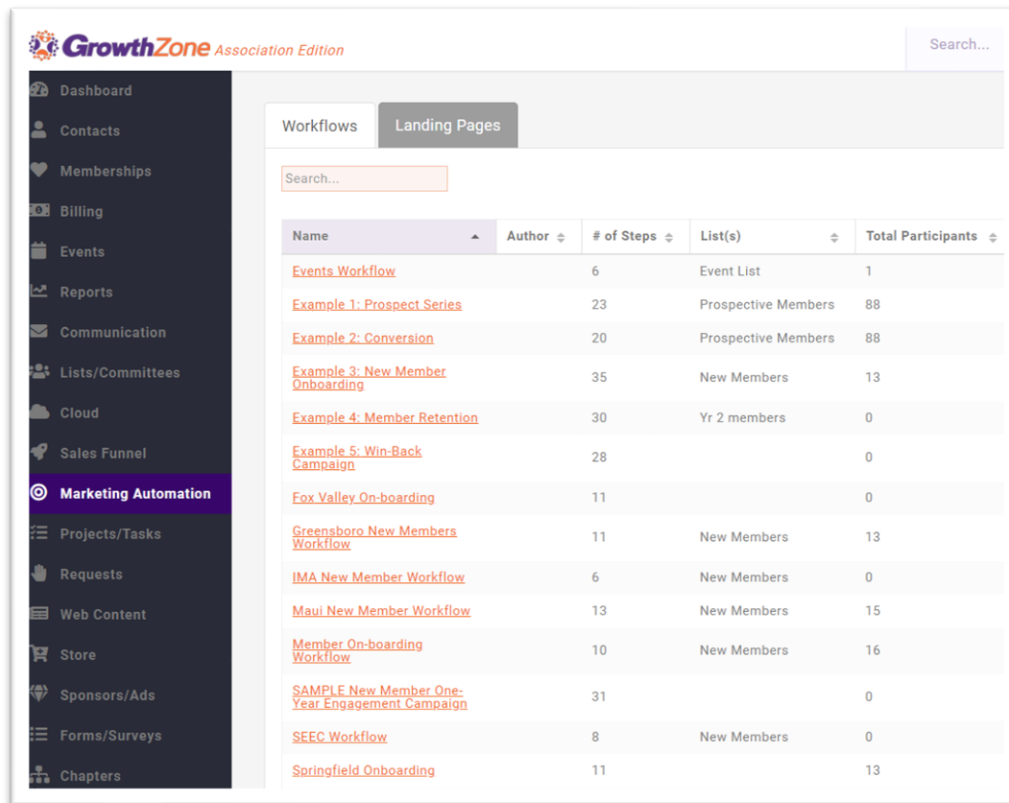
Marketing Automation

What is Marketing Automation?

- *Marketing automation is a schedule of communications (emails) sent at pre-determined intervals to a targeted audience for a specific reason (member engagement, event registration, member retention).*



Marketing Automation



The screenshot displays the GrowthZone Association Edition Marketing Automation interface. The left sidebar contains a navigation menu with items: Dashboard, Contacts, Memberships, Billing, Events, Reports, Communication, Lists/Committees, Cloud, Sales Funnel, Marketing Automation (highlighted), Projects/Tasks, Requests, Web Content, Store, Sponsors/Ads, Forms/Surveys, and Chapters. The main content area is titled 'Workflows' and 'Landing Pages'. It features a search bar and a table of workflows.

| Name | Author | # of Steps | List(s) | Total Participants |
|--|--------|------------|---------------------|--------------------|
| Events Workflow | | 6 | Event List | 1 |
| Example 1: Prospect Series | | 23 | Prospective Members | 88 |
| Example 2: Conversion | | 20 | Prospective Members | 88 |
| Example 3: New Member Onboarding | | 35 | New Members | 13 |
| Example 4: Member Retention | | 30 | Yr 2 members | 0 |
| Example 5: Win-Back Campaign | | 28 | | 0 |
| Fox Valley On-boarding | | 11 | | 0 |
| Greensboro New Members Workflow | | 11 | New Members | 13 |
| IMA New Member Workflow | | 6 | New Members | 0 |
| Maui New Member Workflow | | 13 | New Members | 15 |
| Member On-boarding Workflow | | 10 | New Members | 16 |
| SAMPLE New Member One-Year Engagement Campaign | | 31 | | 0 |
| SEEC Workflow | | 8 | New Members | 0 |
| Springfield Onboarding | | 11 | | 13 |

What is Marketing Automation?

- *The GrowthZone Marketing Automation module provides the functionality to set up automated workflows designed specifically around varying communication goals.*

Marketing Automation

What is Marketing Automation?

- *For example, you may want to have a workflow for new prospects, or perhaps a drip campaign for new members. A workflow can be tied to a campaign list and will allow you to automatically send targeted information to key individuals and groups.*



Marketing Automation

The Marketing Automation Module can...

- Gain Efficiencies by Building “Repeatable” Campaigns
- Setup Custom Messaging for Targeted Lists of Contacts
- Send Emails at Just the Right Time
- Add Logic
- Track and Keep Everyone On Track

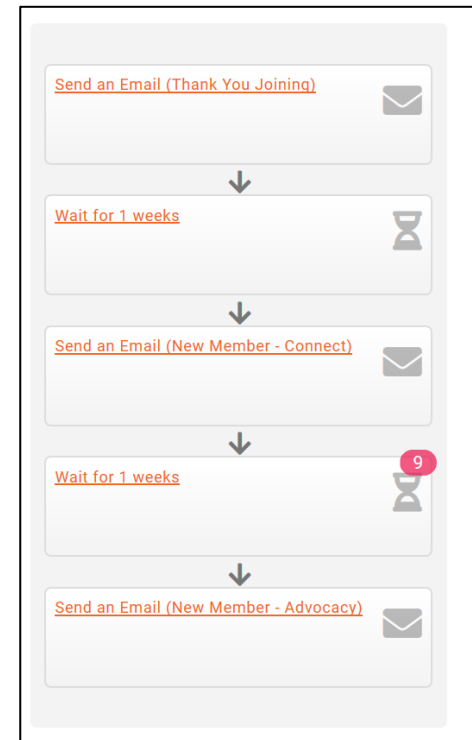


Marketing Automation

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 workflow, 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



Marketing Automation

Set Up Custom Messaging for Targeted Lists of Contacts

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

Back to Lists/Committees

New Members

General Contacts Communication Events Files Import

Search... Customize Results... IncludePublicSubscriptions: True x [Clear All] Actions

| First Name | Last Name | Organization | Email | Role | Join Date | Drop/Delete Date | Do Not Contact | Is Internal Only | Actions |
|-------------------------|-------------------------|--|------------------------|------|-----------|------------------|----------------|------------------|---------|
| Janie | Jones | The Shoe Shop | janie@mailinator.com | | 6/7/2019 | | No | No | |
| Greg | Matts | Ritzy | matts@mailinator.com | | 6/7/2019 | | No | No | |
| Randy | Lange | Pinecones | pine@mailinator.com | | 6/13/2019 | | No | No | |
| Marsha | Furry | Furry Friends | marsha@mailinator.com | | 6/13/2019 | | No | No | |
| Joe | Santino | Joe's Pizzeria | | | 6/13/2019 | | No | No | |
| Rhett | Butler | Rhett's Shoes | butler@mailinator.com | | 6/13/2019 | | No | No | |
| Gary | Mason | | gary@mailinator.com | | 6/13/2019 | | No | No | |
| Allison | Greggs | The Boutique | allison@mailinator.com | | 6/13/2019 | | No | No | |
| Hanhah | Brown | Hannah's Bar & Grill | hannah@mailinator.com | | 6/13/2019 | | No | No | |
| Barry | White | Bouillabaise | barry@mailinator.com | | 6/13/2019 | | No | No | |

Marketing Automation

Set Up Custom Messaging for Targeted Lists of Contacts

Examples:

- *New Members*
- *Exhibitor Leads*
- *Prospective Members*

WIKI: [Lists/Committees](#)

Marketing Automation

Set Up Custom Messaging for Targeted Lists of Contacts

Build a communication drip campaign by defining specific emails that will be sent under this program

WIKI: [Create and Manage Email Templates](#)

| | | |
|--|----------------------|---|
| New Member - Advocacy | Member Communication |   |
| New Member - Connect | Member Communication |   |
| New Member - Engage | Member Communication |   |
| New Member - Thank You Joining | Member Communication |   |

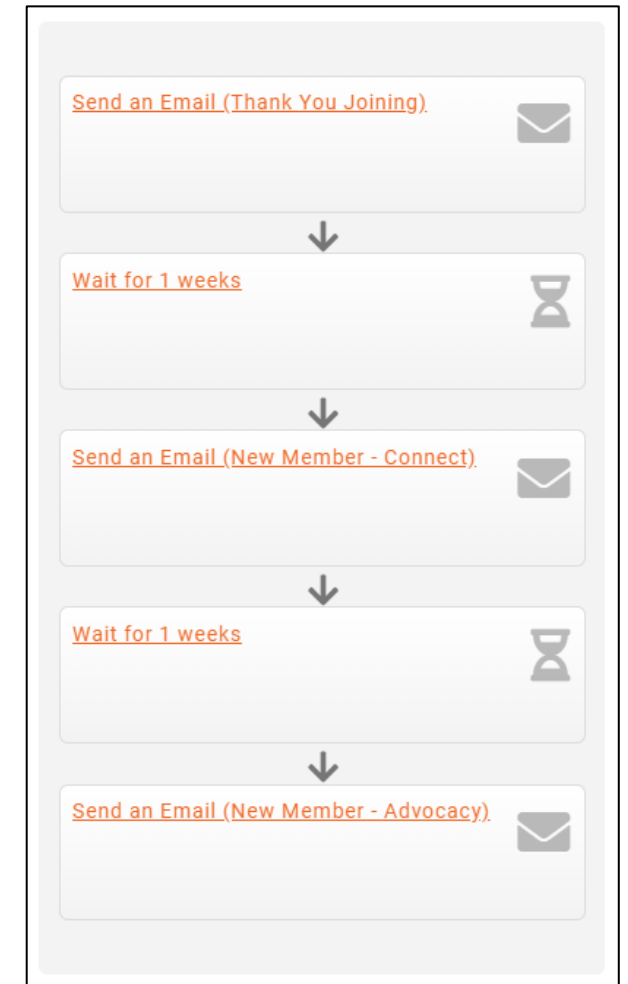
Marketing Automation

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: [Add Steps to your Workflow](#)



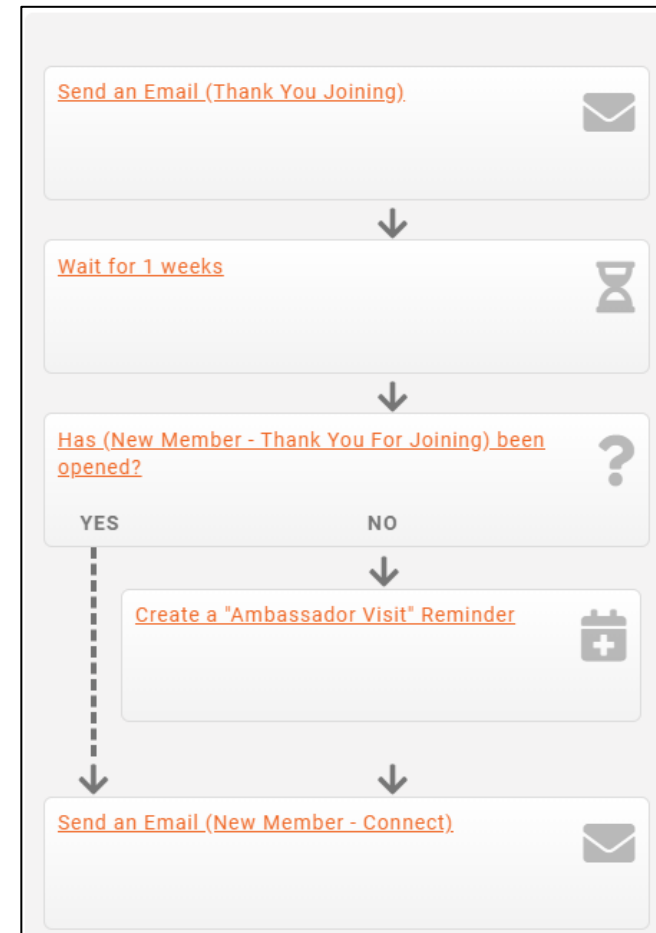
Marketing Automation

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 Step Types](#)

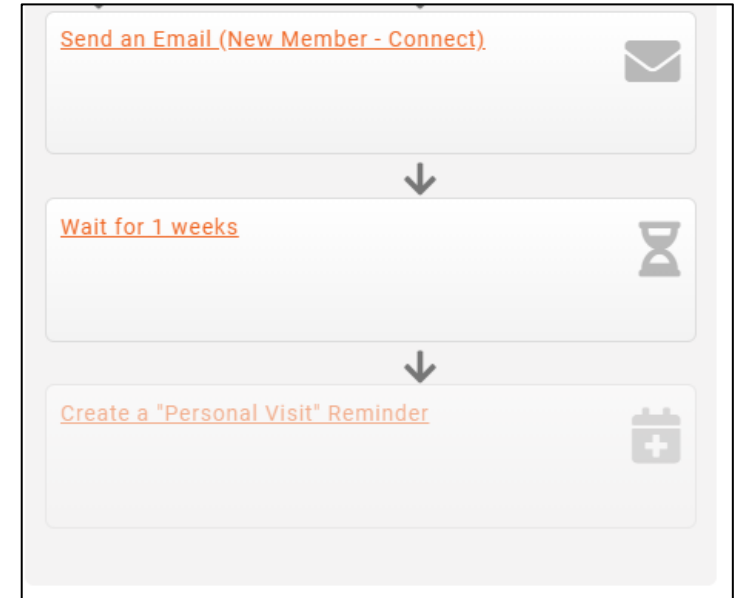


Marketing Automation

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!

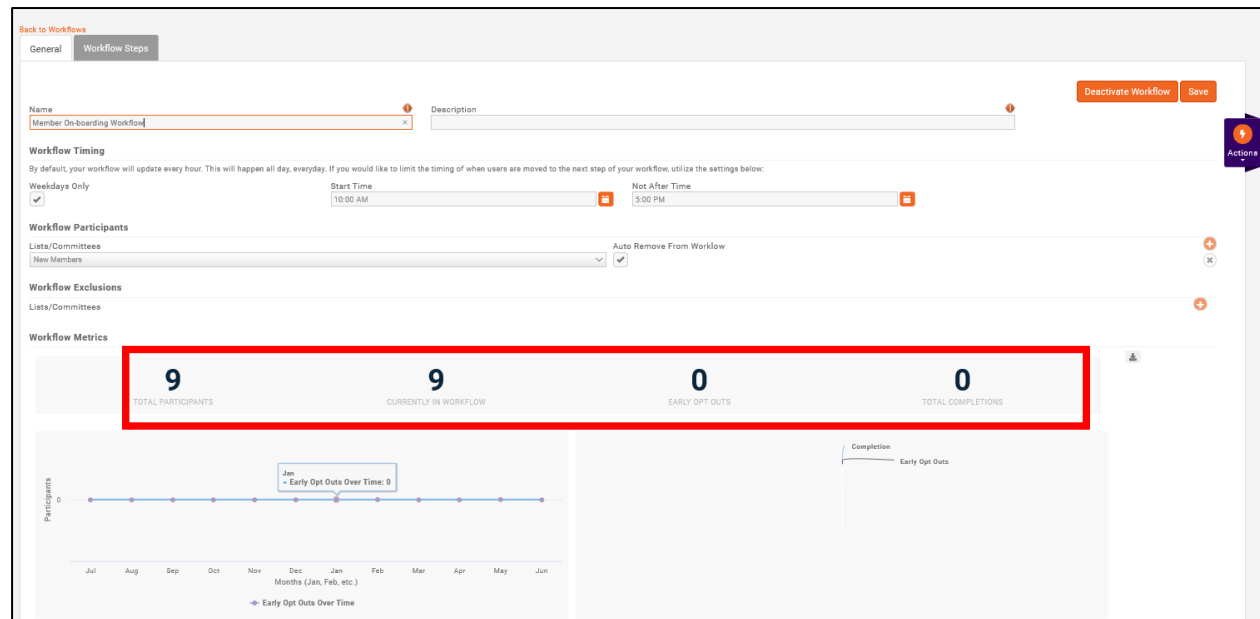
WIKI: [Definitions of Workflow Step Types](#)



Marketing Automation

Track and Keep Everyone on Track

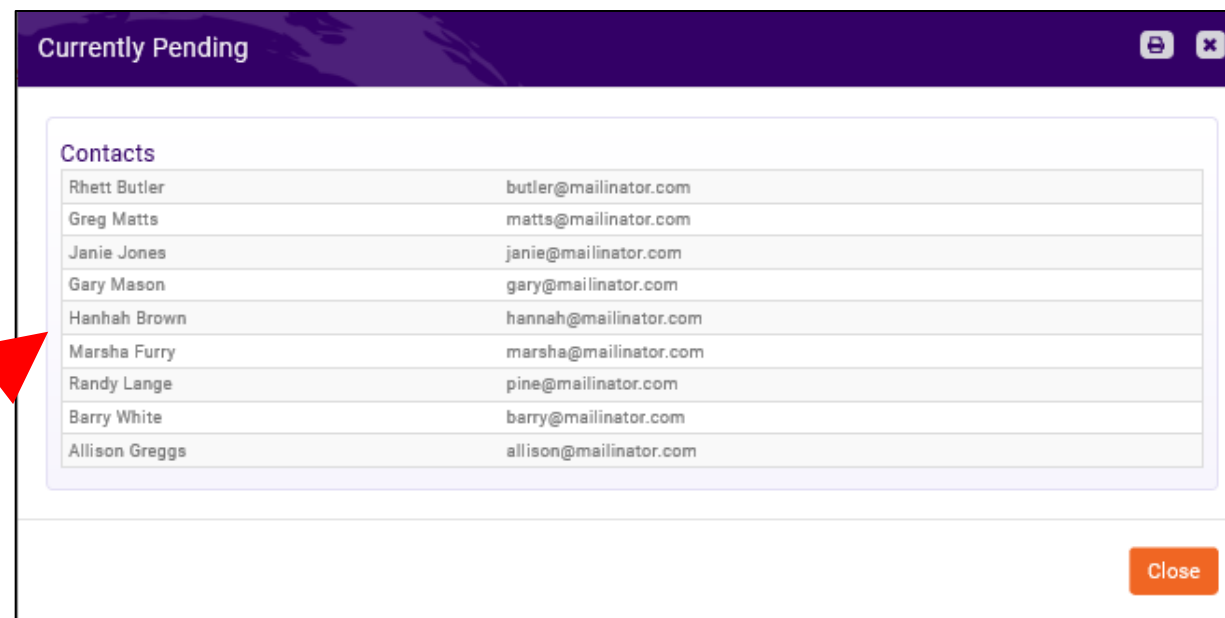
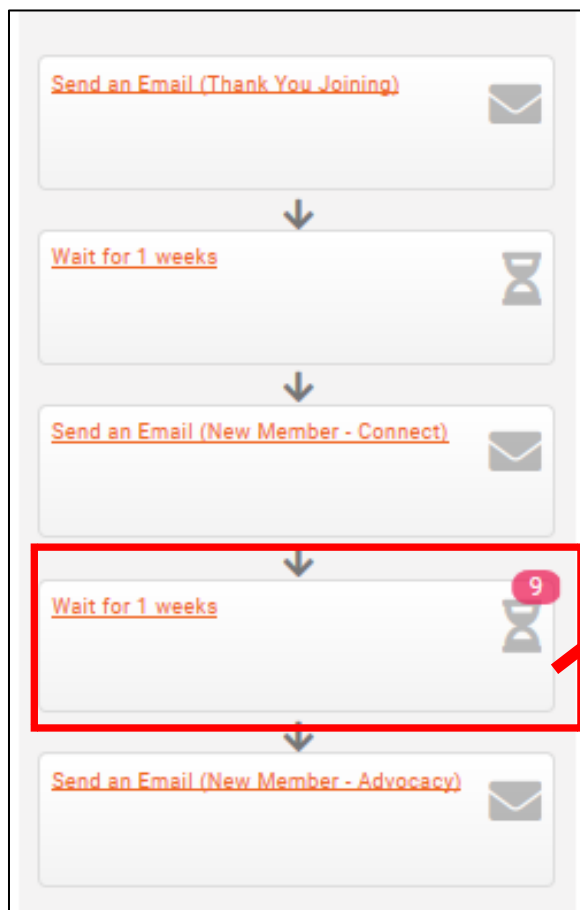
You will also track, and see at a glance which of your contacts is in which step of the workflow...



WIKI: [Workflow Metrics](#)

Marketing Automation

Track and Keep Everyone on Track



A window titled "Currently Pending" with a dark purple header and standard window controls (minimize, maximize, close). It displays a list of contacts under the heading "Contacts".

| Contacts | |
|----------------|------------------------|
| Rhett Butler | butler@mailinator.com |
| Greg Matts | matts@mailinator.com |
| Janie Jones | janie@mailinator.com |
| Gary Mason | gary@mailinator.com |
| Hanhah Brown | hannah@mailinator.com |
| Marsha Furry | marsha@mailinator.com |
| Randy Lange | pine@mailinator.com |
| Barry White | barry@mailinator.com |
| Allison Greggs | allison@mailinator.com |

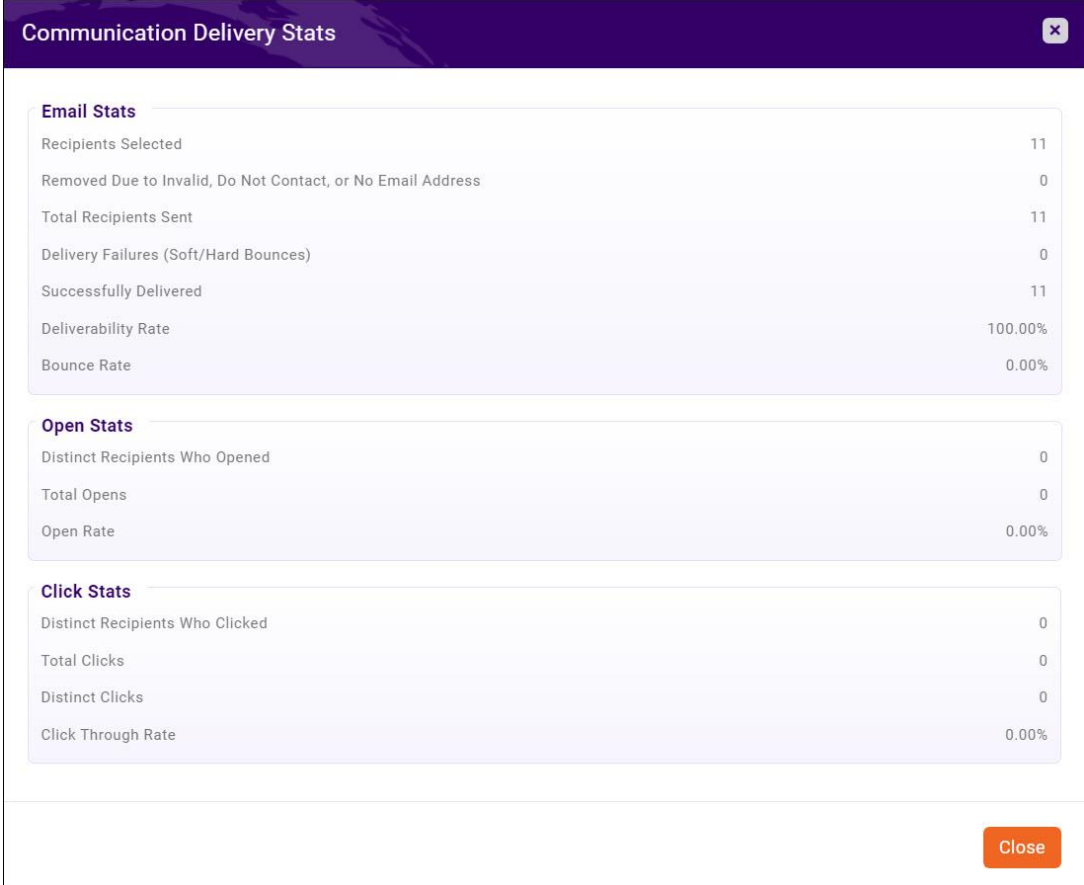
A "Close" button is located at the bottom right of the window.

Marketing Automation

Track and Keep Everyone on Track

Email delivery statistics are available!

WIKI: [View all Delivery Stats](#)



The screenshot displays a 'Communication Delivery Stats' window with three sections: Email Stats, Open Stats, and Click Stats. Each section contains a list of metrics and their corresponding values.

| Category | Metric | Value |
|-------------|---|---------|
| Email Stats | Recipients Selected | 11 |
| | Removed Due to Invalid, Do Not Contact, or No Email Address | 0 |
| | Total Recipients Sent | 11 |
| | Delivery Failures (Soft/Hard Bounces) | 0 |
| | Successfully Delivered | 11 |
| | Deliverability Rate | 100.00% |
| | Bounce Rate | 0.00% |
| Open Stats | Distinct Recipients Who Opened | 0 |
| | Total Opens | 0 |
| | Open Rate | 0.00% |
| Click Stats | Distinct Recipients Who Clicked | 0 |
| | Total Clicks | 0 |
| | Distinct Clicks | 0 |
| | Click Through Rate | 0.00% |

Marketing Automation

Prep and Plan

Marketing Automation

Prep and Plan

Now that you know what the Marketing Automation module can do, it's time to map out your campaigns and steps. But 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 [Add a New List/Committee](#).*

Marketing Automation

Workflow Examples



Workflow 1:

Contacts Who Have Completed a Form

In our first example, we have emailed out a form to a list of contacts (our active members) in our database and would like to send those who have completed submission of the form some additional information if they indicated to do so.

Workflow 2:

Contacts Who Have NOT Completed a Form

Building on our previous workflow, we want to periodically remind our members who have NOT completed the form to click the link and submit their responses.

Workflow Examples:

Our two workflows will run simultaneously and will use two email lists- our list of active members that we compiled for this form, and a new list of contacts who have submitted their responses.

We have already [created our form](#) and [generated our email list, sent the form](#) to our email list, [set up our email templates](#) for the follow up communications, [saved the Form Response Report](#) for our form, and [created our “Responses” email list](#) from our saved report.

More Examples:

Check out the Knowledge Base “Workflow Examples”!

We have 5 detailed examples of common workflows:

- [Prospect Development](#)
- [Lead Conversion](#)
- [New Member Onboarding](#)
- [Member Retention](#)
- [Win-Back Campaign](#)

Also, a great webinar with Frank Kenny on "[Automated Member Recruitment & Retention](#)"!

Questions?

Training and Support

Customer Service Hours:

Monday-Friday: 8am to 5pm (Central)

GZSupport@growthzone.com

800.825.9171, Option 4, then Option 2

Online Support Documentation:

[GrowthZone Knowledge Base »](#)

Training Calendar:

[View Training Event Calendar »](#)

Live Chat:

[GrowthZone Support Portal \(chat on far right\) »](#)