GrowthZone:
5 Ways to Make the Most of Marketing Automation

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Overview

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.

5 Ways…

1. Gain Efficiencies with "Repeatable" campaigns
2. Create 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
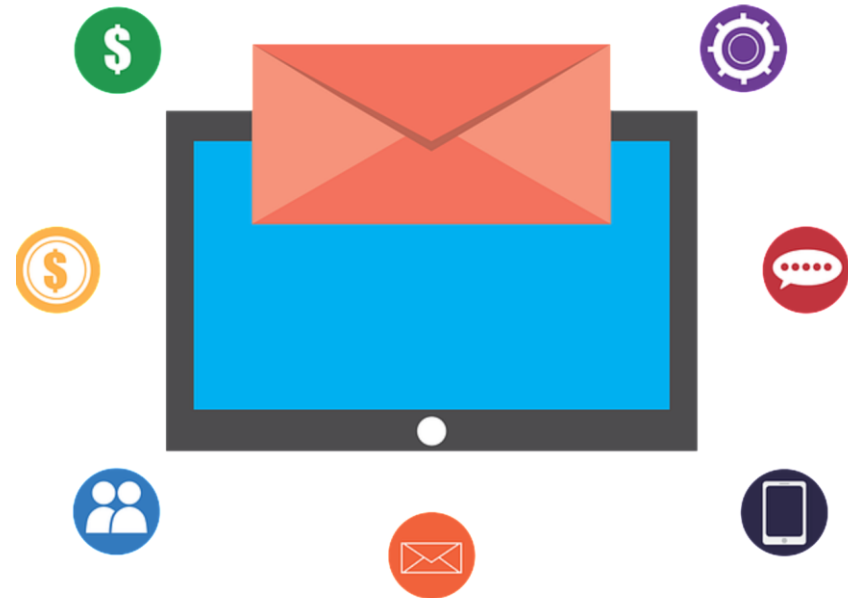
1. Gain efficiencies with "Repeatable Campaigns"

Repeatable Campaigns can be designed through the marketing automation module, then used over and over to save you time.
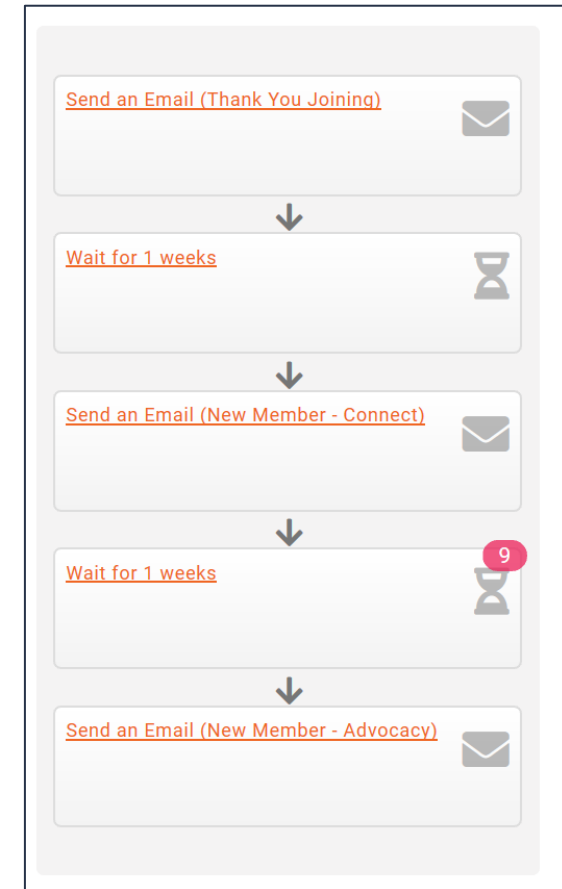
Contacts can be added manually or automatically via membership settings or Smart Lists.

1. Gain efficiencies with "Repeatable Campaigns"

For example, you may have a series of emails that you send to new members – for this workflow, you will simply add the new member list to the membership settings and as members join, they are automatically added to the list and to the workflow.

Knowledge Base:

[Workflow Example: New Member Onboarding](#)

Send an Email (Thank You Joining)

Wait for 1 weeks

Send an Email (New Member - Connect)

Wait for 1 weeks ⑨

Send an Email (New Member - Advocacy)

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2. Custom Messaging for Targeted Lists of Contacts

Create lists of participants that you would like to include in your drip campaign.
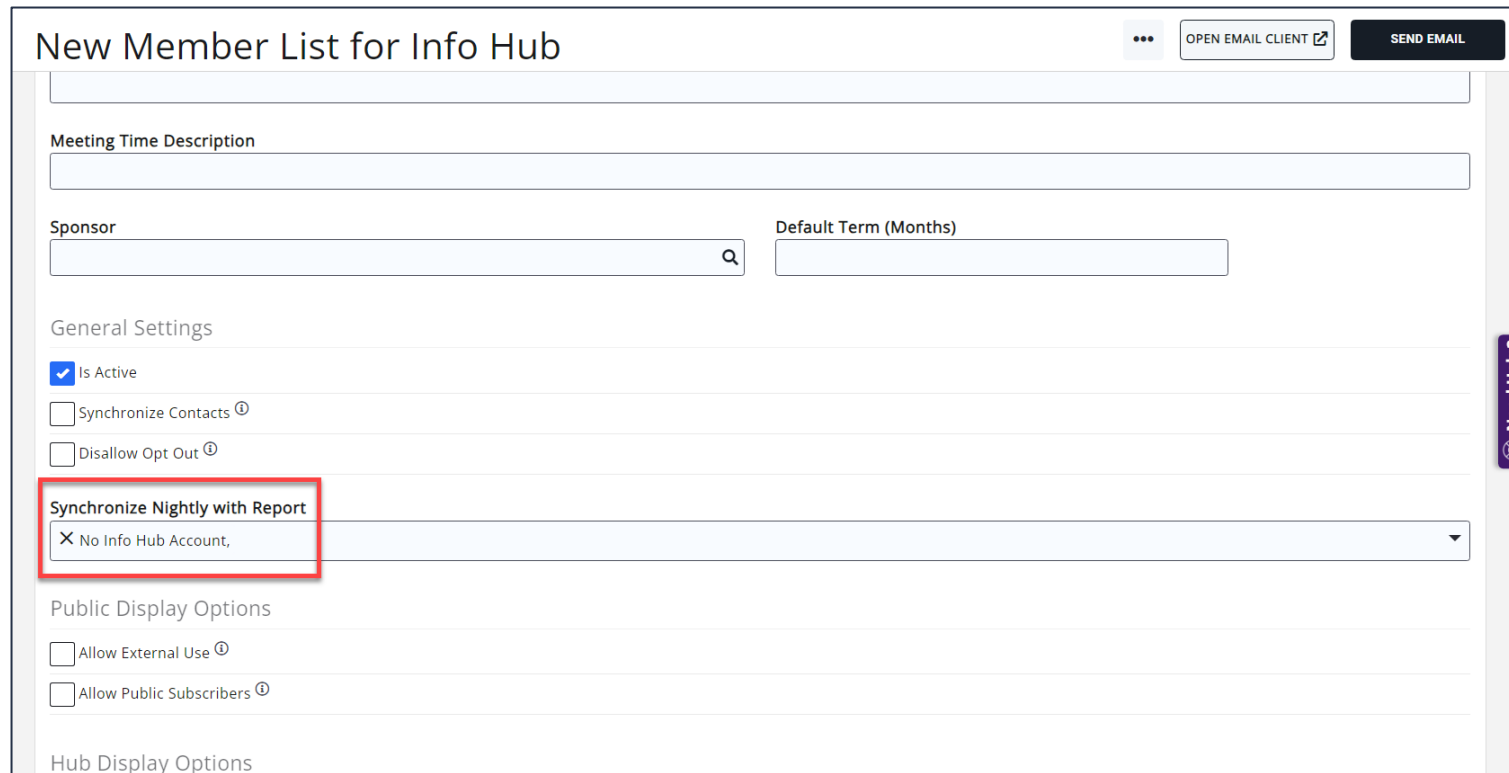
2. Custom Messaging for Targeted Lists of Contacts

Examples:
- New Members
- Exhibitor Leads
- Prospective Members

Knowledge Base: Working with Lists/Committees

2. Custom Messaging for Targeted Lists of Contacts

If needed, set up Smart Lists that update nightly to ensure on the applicable contacts continue to receive messaging.

2. Custom Messaging for Targeted Lists of Contacts

Examples:

- Info Hub Login Creation campaigns
- Event registration pushes
- Contacts missing specific information like websites, addresses, phone numbers, etc.

Knowledge Base: Smart Lists

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2. Custom Messaging for Targeted Lists of Contacts

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

Name	Category	Description	Shows in Template list	Actions
SAMPLE New Member Welcome Email	Member Communication	New Member Campaign Email 1 - Welcome	Yes	
SAMPLE New Member Email – Info Hub	Member Communication	New Member Campaign Email 2 – Member Info H...	Yes	
SAMPLE New Member Email - Events	Member Communication	New Member Campaign Email 3 - Events	Yes	
SAMPLE New Member Email - Directory	Member Communication	New Member Campaign Email 4 - Directory	Yes	

Knowledge Base: Create and Manage Email Templates

Knowledge Base: Email Designer

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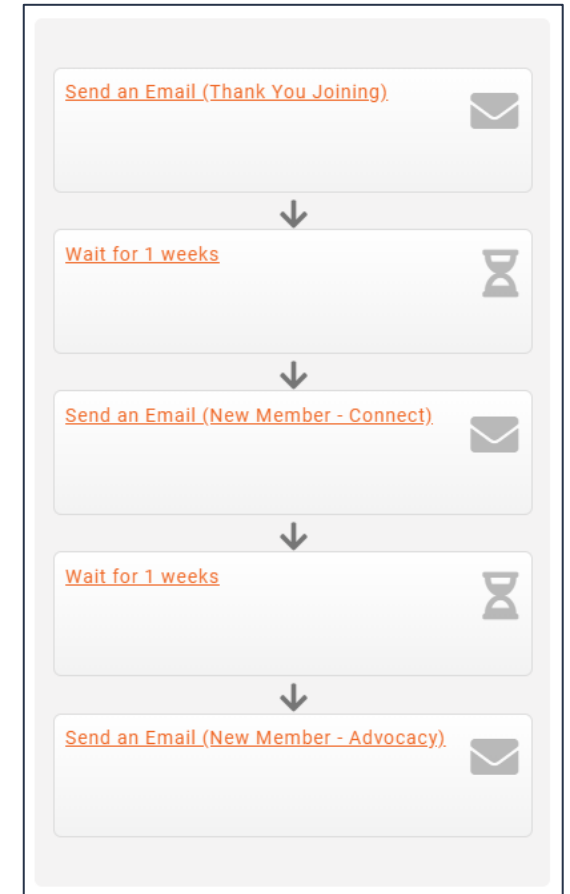
3. Send Emails at Just the Right Time

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

Knowledge Base: <u>Add Steps to your Workflow</u>

3. Send Emails at Just the Right Time

Timing steps can be elapsed time or calendar-based.
- Elapsed time:
  - "Wait" step type
  - Waits a predetermined amount of time (1 day, 1 week, etc.)
  - Good for new member onboarding or account creation workflows
- Calendar-Based:
  - "Wait Until" step type
  - Waits until an exact date
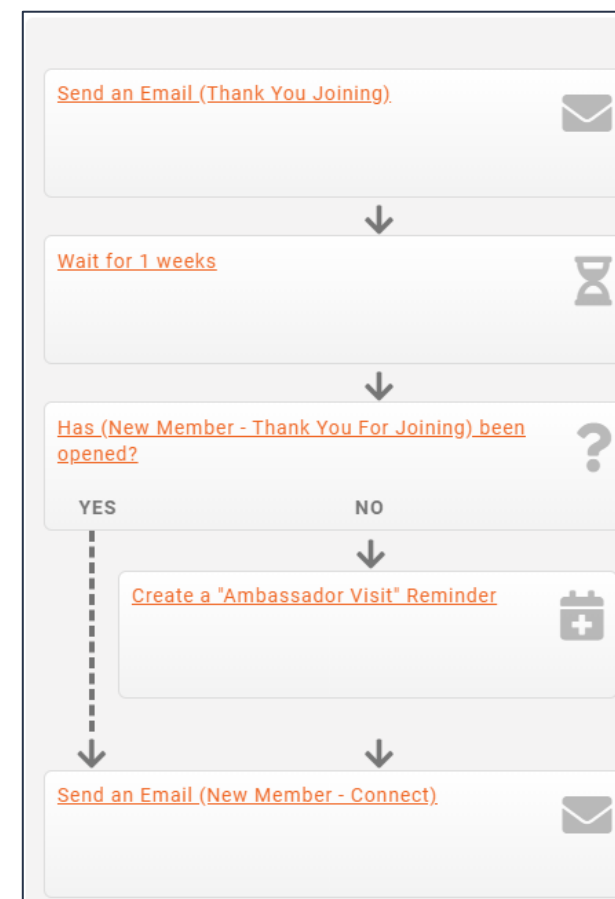 - Good for event registration pushes or date-specific campaigns

Knowledge Base: Definitions of Workflow Step Types

4. Add Logic

Logic branches allow you to take a different course of action based on a condition.

- Has the email been opened?
- Did they view a landing page?
- Did they submit a form?
- What is their membership status?

Knowledge Base: Logic Branch Options

4. Add Logic

Don't forget to check your Delivery Statistics on each email for more insight- who is opening, how many times, did they click the link, etc.
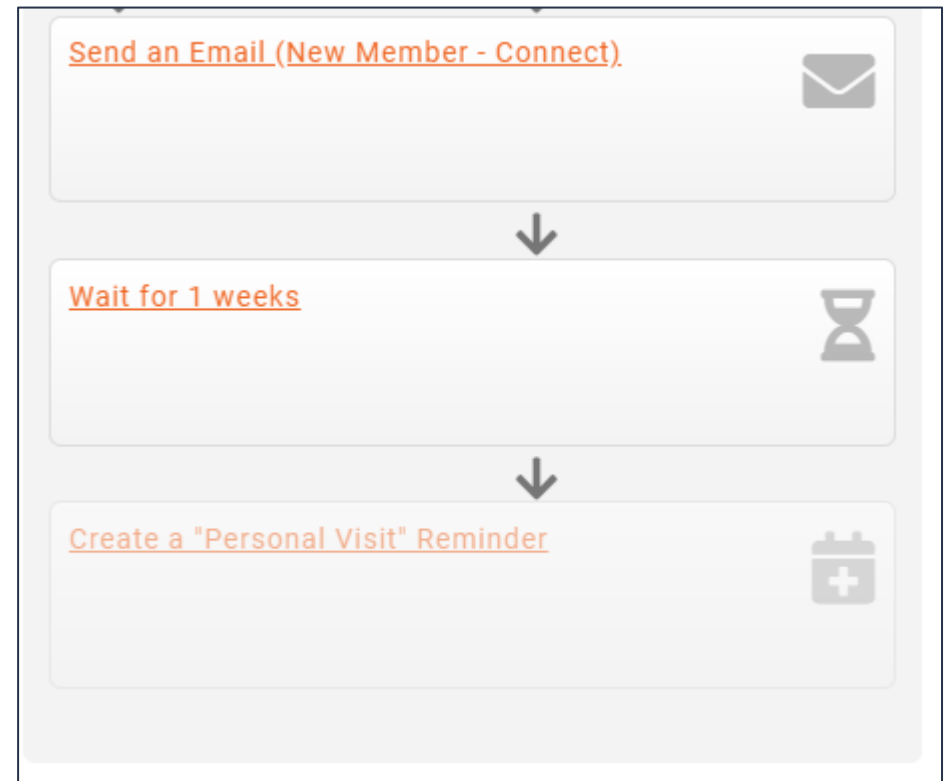
Knowledge Base:
<u>View Email Delivery Statistics</u>

Communication Delivery Stats	‹ 4 of 100 ›	✕

Email Stats

Recipients Selected	90
Removed Due to Flood Protection, Invalid, Do Not Contact, or No Email Address	17
Total Recipients Sent	73
Delivery Failures (Soft/Hard Bounces)	0
Successfully Delivered	73
Deliverability Rate	100.00%
Bounce Rate	0.00%

Open Stats

Distinct Recipients Who Opened	0
Total Opens	0
Open Rate	0.00%

Click Stats

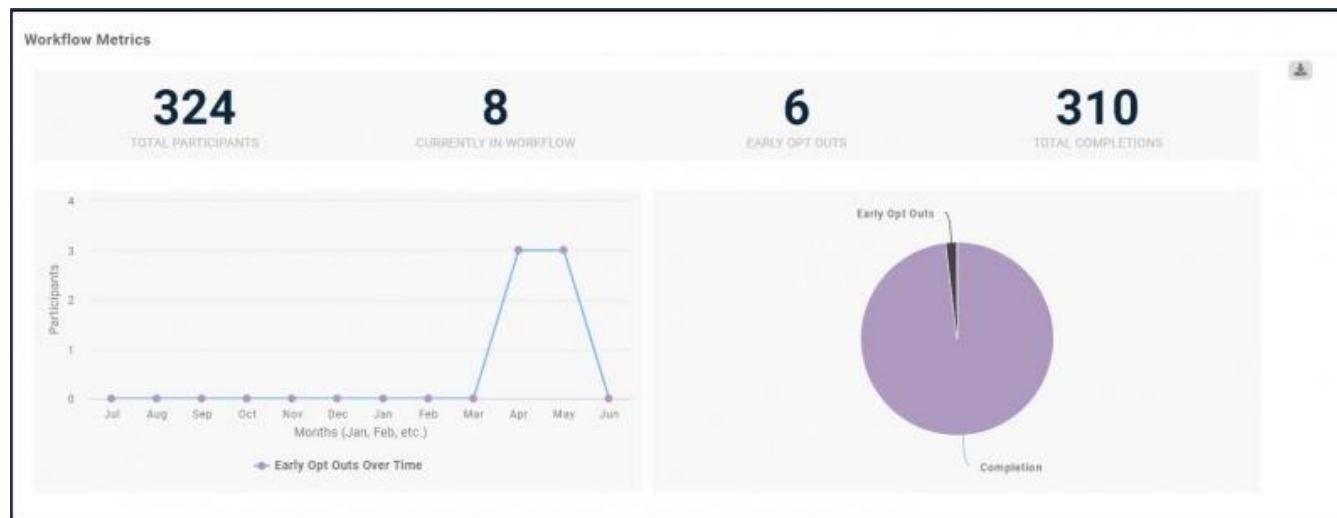|	
Distinct Recipients Who Clicked	0
Total Clicks	0
Distinct Clicks	0
Click Through Rate	0.00%

Close

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!

Knowledge Base:
Definitions of Workflow Steps Types

Send an Email (New Member - Connect)

↓

Wait for 1 weeks

↓

Create a "Personal Visit" Reminder

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...

Knowledge Base: Workflow Metrics

5. Track and Keep Everyone On Track

Final Thought...

Why use Marketing Automation?

It is an excellent way to reach out to your contacts and automate time-consuming, demanding, or manual tasks which otherwise could be forgotten, missed, or contain mistakes.

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Questions?

Training and Support

Customer Service Hours:

Phone: 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)

800.825.9171, Option 4, then Option 2

Chat: 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)

7 a.m. – 4:45 p.m. CT (Friday)

Online Support Documentation: GrowthZone Knowledge Base »

Online Training Calendar: Training Event Calendar »

Live Chat: GrowthZone Support Portal (chat on far right) »