

# GrowthZone - 5 Best Practices for Marketing Automation



## What is Marketing Automation Best Practices

- Know Your Goal
- Target Your Audience
- Make it Engaging
- Timing is Everything
- Call to Action

## Prep and Plan Example Workflows

- Prospect Development
- Lead Conversion
- New Members Onboarding
- Member Retention
- Win-Back Campaign

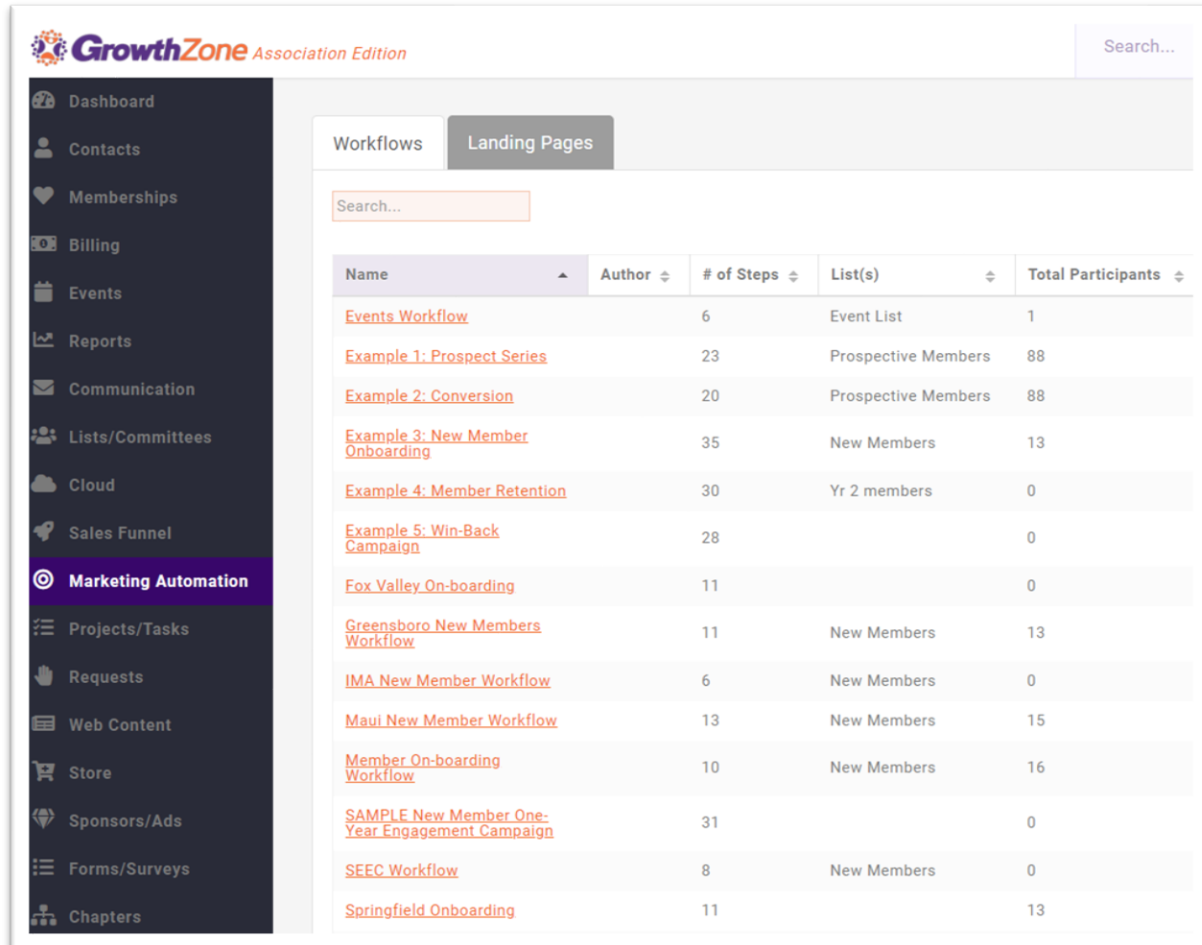
## What is Marketing Automation?

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- 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 interface. On the left is a dark sidebar with a menu including 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 has tabs for Workflows and Landing Pages, with Workflows selected. Below the tabs is a search bar and a table of workflows.

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

## 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.



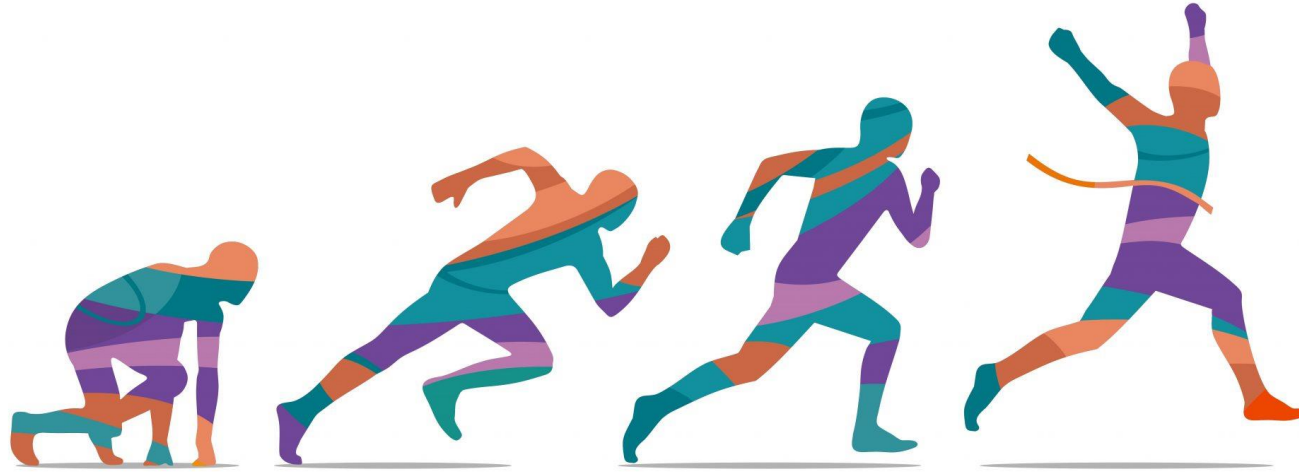
## Best Practices: KNOW YOUR GOAL

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







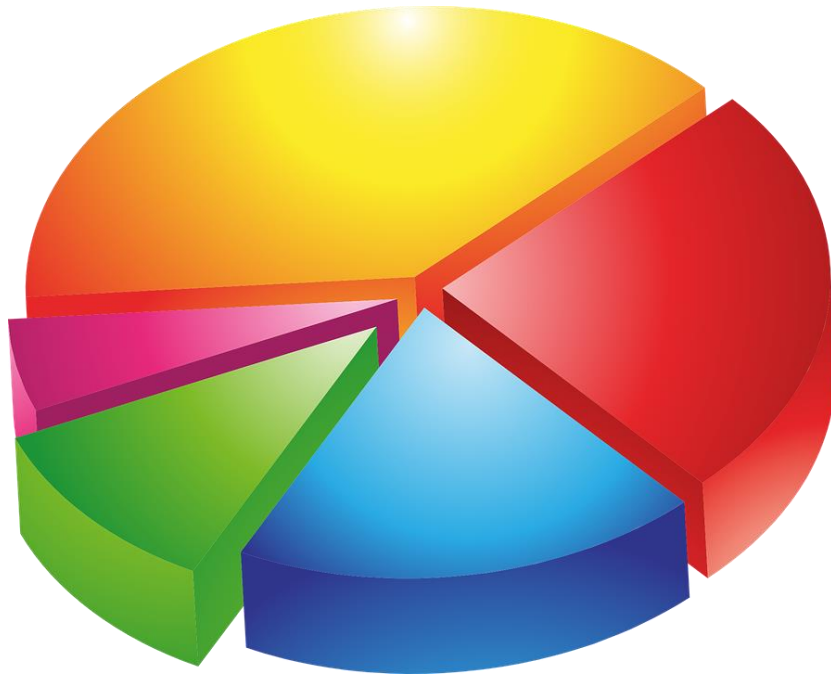
## Best Practices: Know Your Goal

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.

## Best Practices: TARGET YOUR AUDIENCE

## 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.

## Best Practices: Target Your Audience

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



**Best Practices:  
MAKE IT ENGAGING**

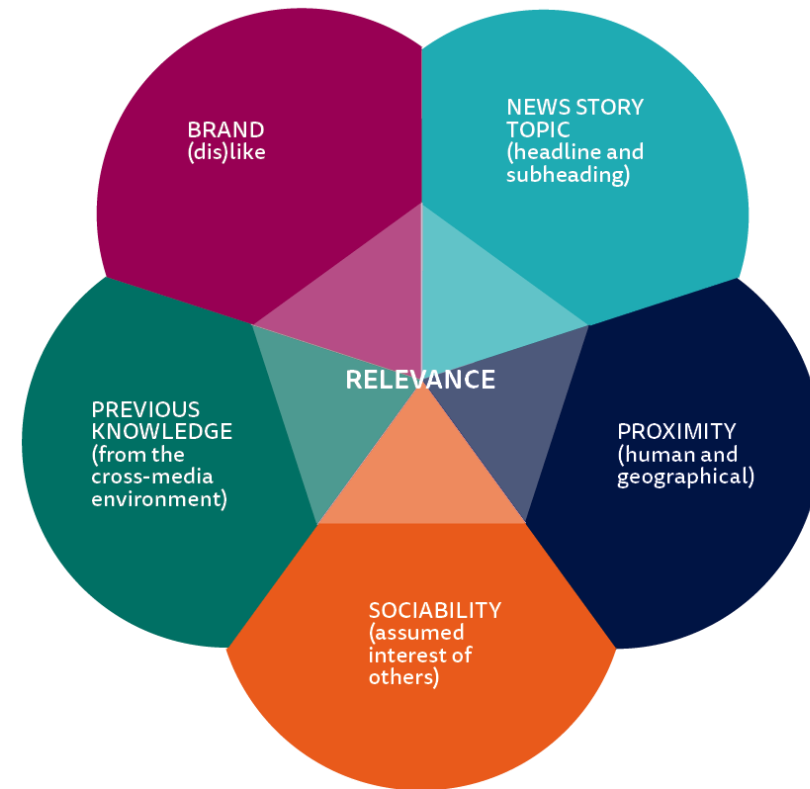
## Best Practices: Make it Engaging



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

## 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.



## 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.





## Best Practices: TIMING IS EVERYTHING

## Best Practices: Timing is Everything



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

## Best Practices: Timing is Everything

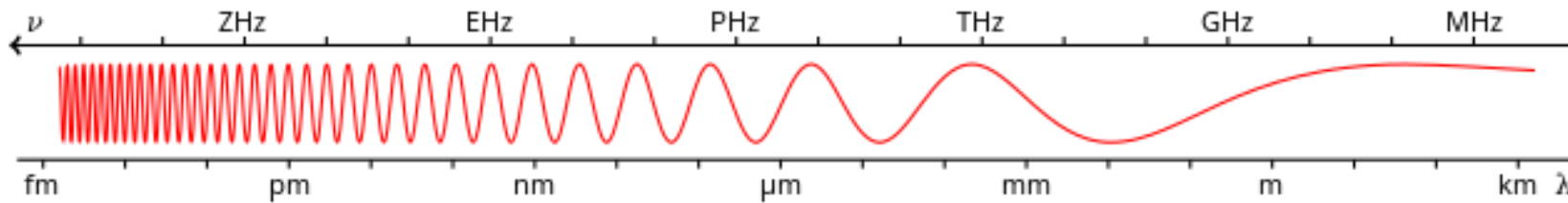
Onboarding a new member? Send several emails quickly to take advantage of their excitement.

Existing members can usually wait a bit longer between emails.



## Best Practices: Timing is Everything

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



## Best Practices: CALL TO ACTION

## 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...





## 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.

## Prep and Plan



## Prep and Plan

Now that you've defined your goals and have some direction, it's time to map out your campaign 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 [Working with Lists/Committees](#).



## Workflow Examples

## Example Workflow 1: Prospect Development

### Goal:

Convert a contact into a warm/hot lead

### Audience:

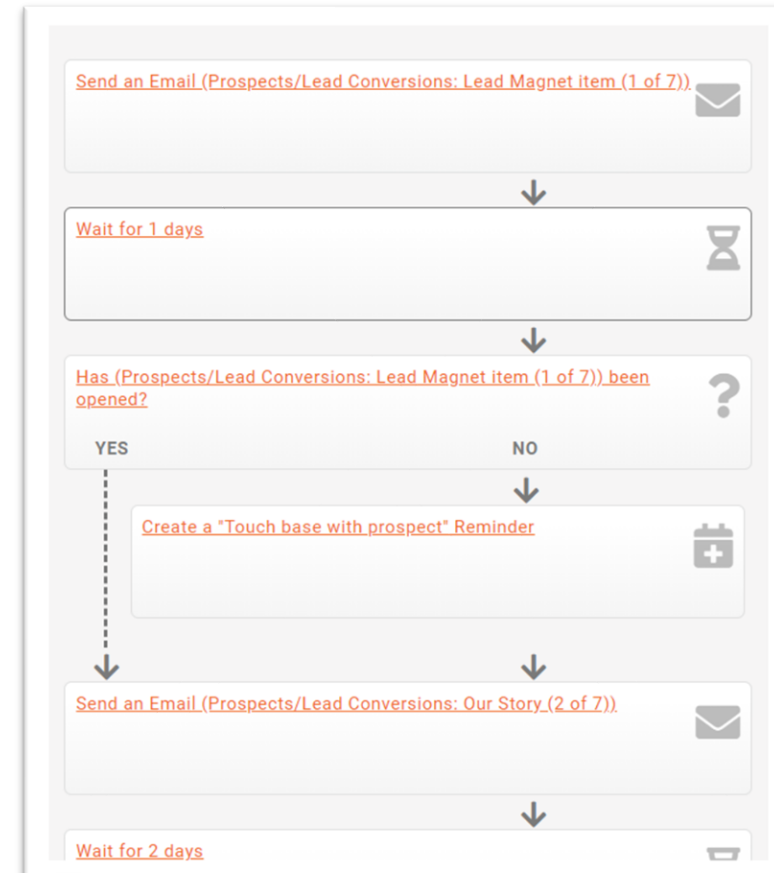
Opted-in contacts via lead magnets  
(items/info of value)

### Content:

Deliver lead magnet item/info, value,  
content

### Actions:

Register for events, feedback/surveys



## Example Workflow 2: Conversion

(runs concurrently with Prospect Engagement, differentiate per lead magnet item/info)

### Goal:

New Member!

### Audience:

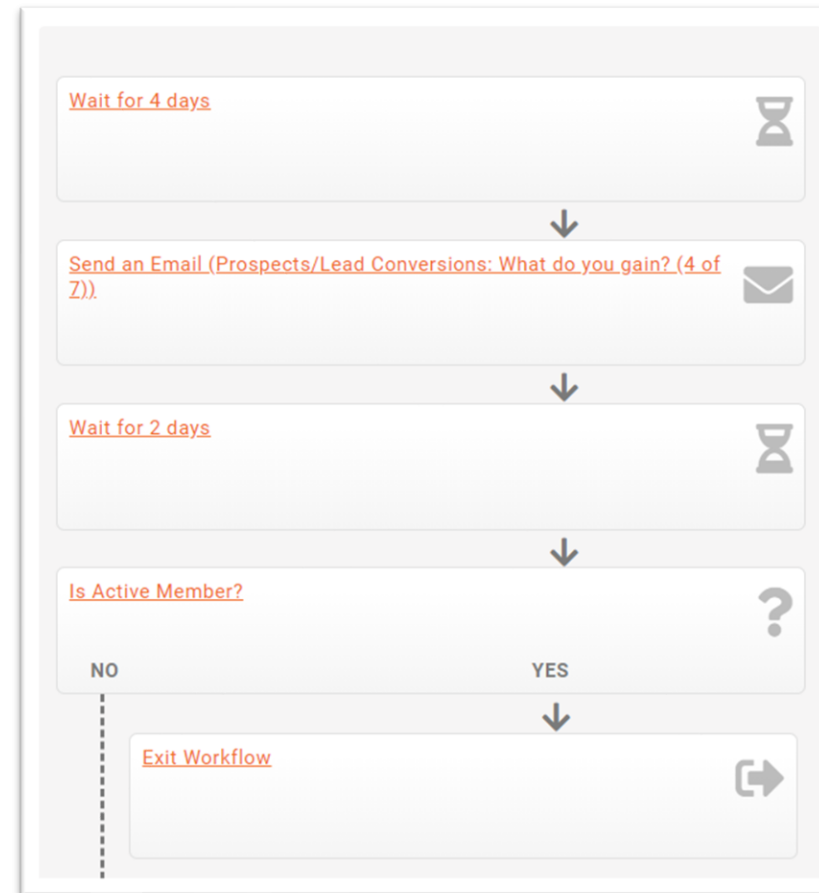
Opted-in contacts via lead magnets  
(items/info of value)

### Content:

Membership gains, logic of joining,  
limited offer

### Actions:

Membership application



## Example Workflow 3: New Member Onboarding

### Goal:

Create advocates who renew!

### Audience:

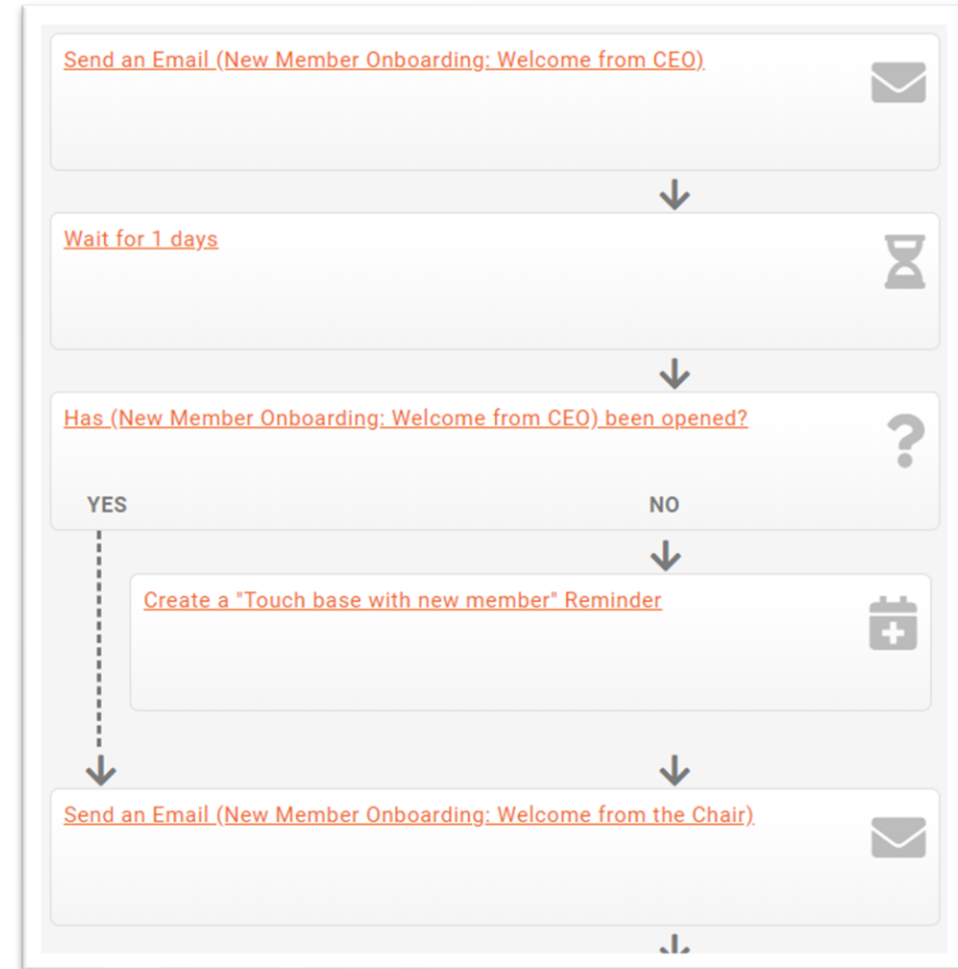
New members

### Content:

Benefits, networking, support

### Actions:

Engagement, events, representation



## Example Workflow 4: Member Retention

### Goal:

Consistent member renewals

### Audience:

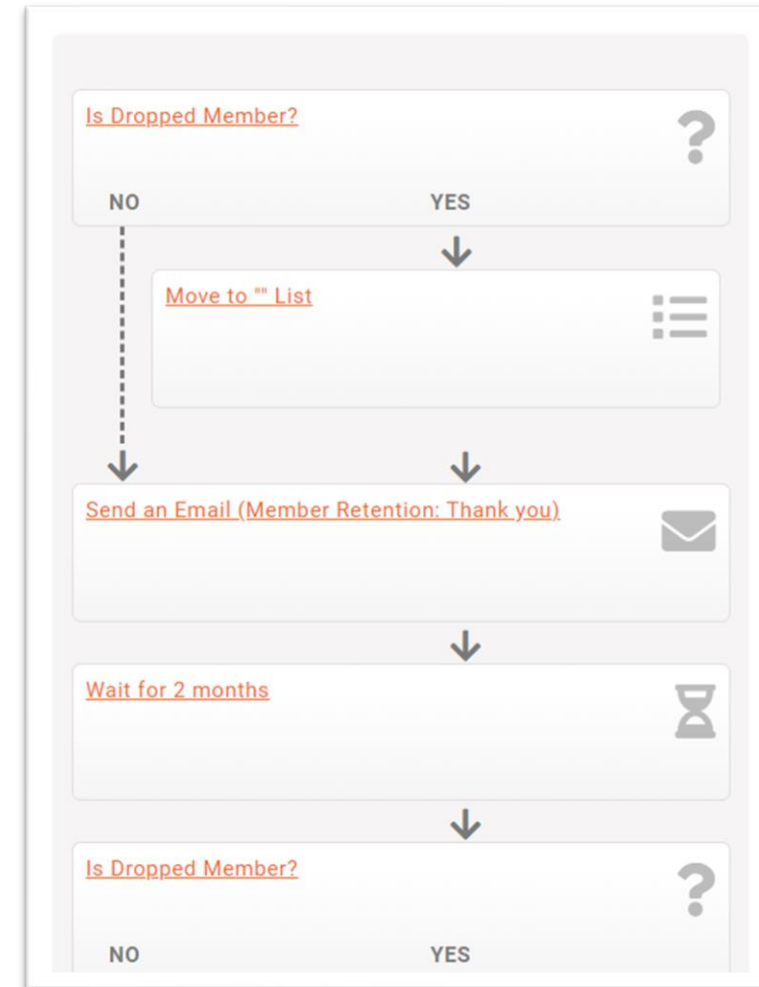
Existing Members, 2<sup>nd</sup> yr and on

### Content:

Benefits, items/info of value, support, credibility, community impact

### Actions:

Participation, engagement, renewal



## Example Workflow 5: Win-Back Campaign

### Goal:

Regain membership

### Audience:

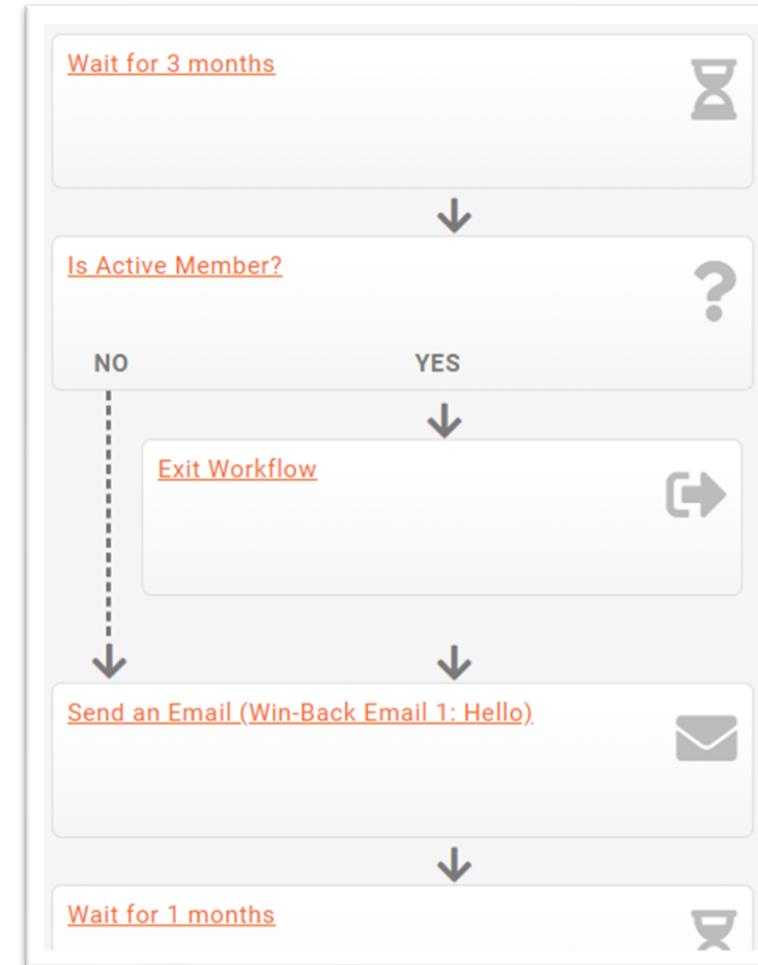
Expired/Dropped Members

### Content:

Benefits, items/info of value, support, credibility, community impact

### Actions:

Feedback, dialogue, reactivation



## Workflow Examples

All workflow examples are available in the Wiki [HERE](#).

Workflows			
Landing Pages			
example			
Name ▲	Author ⇅	# of Steps ⇅	List(s) ⇅
<a href="#">Example 1: Prospect Series</a>		23	Prospective Members
<a href="#">Example 2: Conversion</a>		20	Prospective Members
<a href="#">Example 3: New Member Onboarding</a>		35	New Members
<a href="#">Example 4: Member Retention</a>		30	Yr 2 members
<a href="#">Example 5: Win-Back Campaign</a>		28	



# Questions?



## **Customer Service Hours:**

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

[GZSupport@growthzone.com](mailto:GZSupport@growthzone.com)

800.825.9171, Option 4, then Option 2

## **Online Support Wiki:**

[Access Wiki »](#)

## **Training Calendar:**

[View Training Event Calendar »](#)

## **Integrated Help/Chat:**

[GrowthZone Support Portal](#)

Email Marketing Best Practices for Chambers (frankjkenny.com)

Automated Email Workflows: Examples, Best Practices, and Templates  
(smartsheet.com)

Automated Member Recruitment & Retention (Frank Kenny/GrowthZone)

GrowthZone New Member Onboarding Plan (GrowthZone)

Don't Play Hard to Get: How Can Associations Ensure That Members Know  
Their Benefits (vocalmeet.com)

5 Messages of Your Win-Back Campaign (activecampaign.com)