Email Portfolio Assessment Workshop

Please fill out the Email Portfolio Assessment Workbook prior to this session for review.
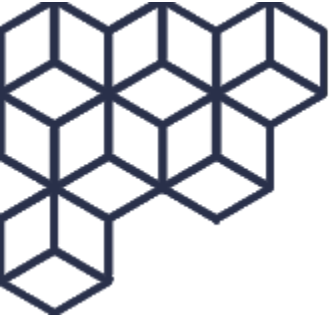
GOALS

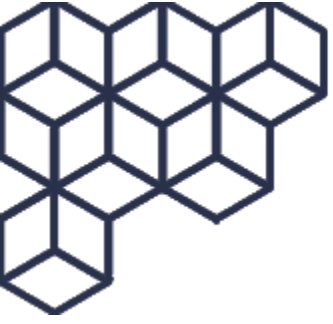- What do you hope to achieve with your email program?

CHALLENGES

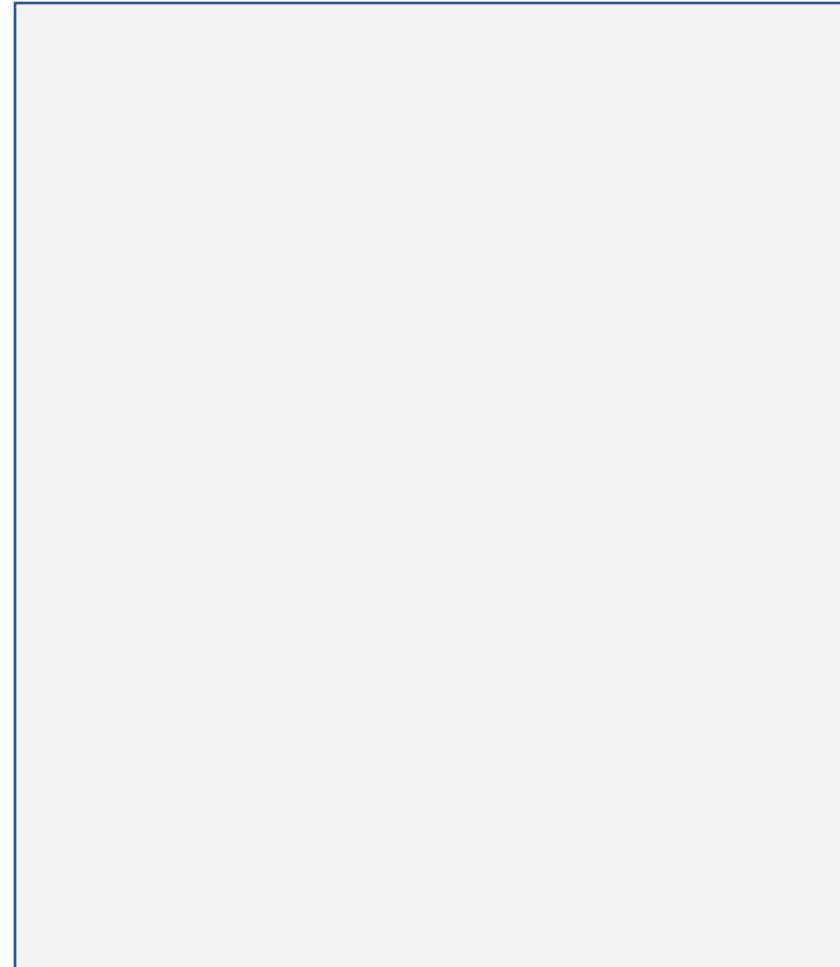- What are your biggest obstacles in reaching your email goals?
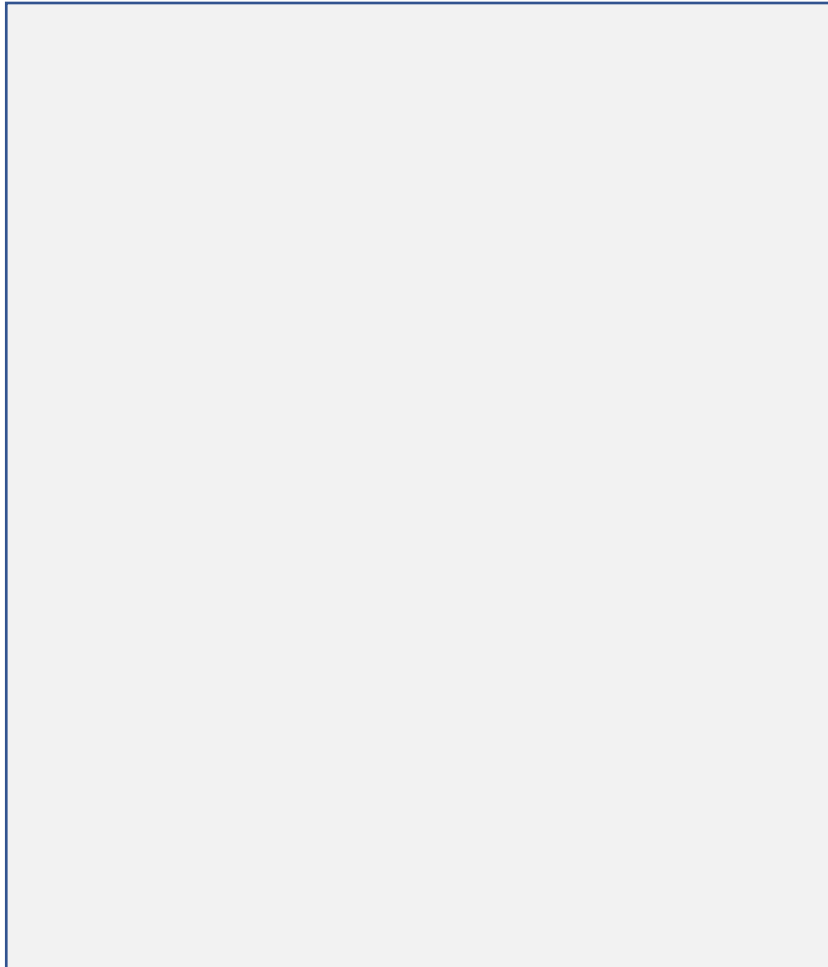
Let's review your workbook…

Let's review examples of your current emails

Email Marketing Best Practices

Optimize Your Content

Explore Interactive Elements

- Real Time Content

- Quizzes & Interactive Surveys

- GIFs/Videos

- Animated Buttons/CTA's

- Rollover/Click to View Effects

Note: some email clients are limited in rendering interactive elements, so static rendering defaults should be established

Long-Form & Storytelling Content

- Text-only emails that feel like a personal message
- Storytelling with authenticity and humor

User-Generated Content (UGC)

Allow your users to create and feature their content (text, video, audio, logos, feedback, reviews) in your email cadence.

WE CAN'T WAIT TO SHARE OUR SECRET PROJECT WITH YOU SOON

Can you guess where we are going?

TAP OR HOVER **CLUE** TO REVEAL   TAP OR HOVER **CLUE** TO REVEAL   TAP OR HOVER **CLUE** TO REVEAL

Keep an eye out for our big reveal soon!

HighRoad Solutions™

Fine Tune Your Personalization

Create Relevant, Targeted Content...
- Include customer name, logo, or user first name
- Customize Product/Service Recommendations
- Incorporate membership levels or other account info
- Events attended or indicated interest in

Automation & Data Hygiene

Quality Automation Requires Quality Data

- Identify & prioritize collection of actionable data fields

- Conduct regular hygiene campaigns & regularly update databases to ensure clean and accurate data

What is Email Automation?

Email automation a method of automating email communication using segmented, data-driven or behavioral triggers to manage common email marketing workflows.
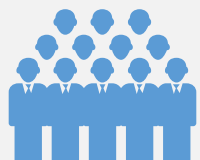
Some use cases for automation could be:

- Event Registration Email Series
- Member Renewal Reminders
- Ecommerce Transactional Notifications
- Cart Abandonment Notifications

Email Automation Components

Four integral pieces to mapping
out your automation journey

Segments

Identify your target audience

based on their demographics,

interests, behaviors, etc.

Content

Build and map your content

themes to meet your key

objectives and values.

Assets

Identify the formats of your
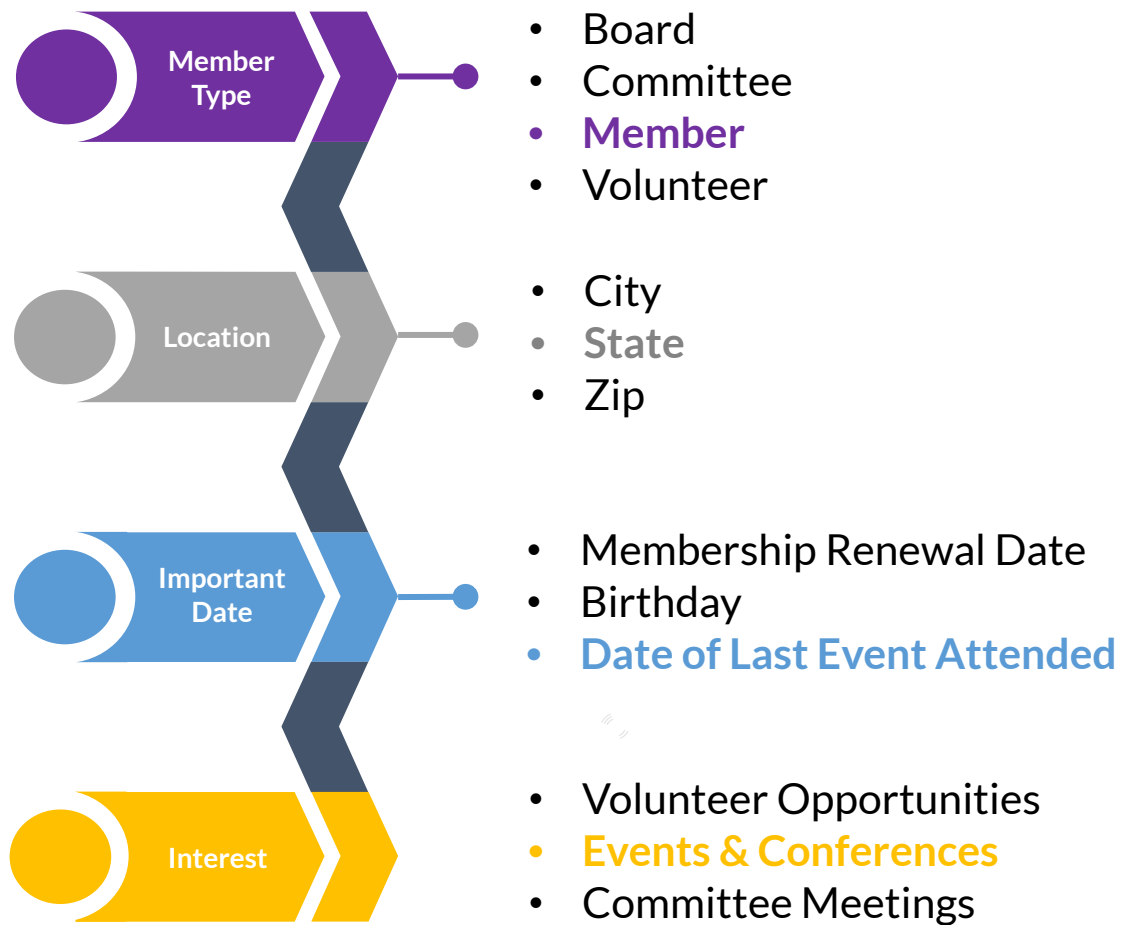
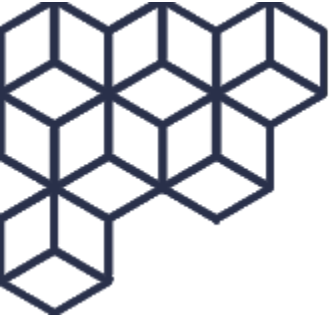assets and where they're going

to fall in the workflow.

Workflows

Bring all the pieces

together into the platform and

hit go.

Pre-Define Segmentation

Member Type
- Board
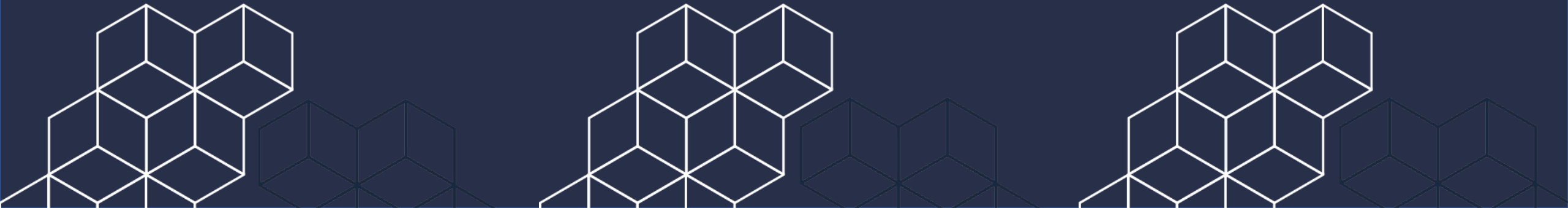- Committee
- **Member**
- Volunteer

Location
- City
- **State**
- Zip

Important Date
- Membership Renewal Date
- Birthday
- **Date of Last Event Attended**

Interest
- Volunteer Opportunities
- **Events & Conferences**
- Committee Meetings

NEW AUTOMATION LIST:
- All Members
- Located in Virginia
- Attended an event in last 3 years
- Interested in Local Events

Event Registration Automation Example

NEW AUTOMATION SEGMENT:

- All Members
- Located in Virginia
- Attended an event in last 3 years
- Interested in Local Events

EVENT ANNOUNCEMENT SEND

WAIT 1 WEEK

EVENT REGISTRATION SEND

Registered → THANK YOU FOR REGISTERING

Not Registered → EVENT REGISTRATION REMINDER

Cart Abandonment Automation Example

Web Trigger:

- No Form Completion
- Landing Page Visit but No Download
- Viewed Ad but No Click
- Items Left in Cart

EXIT SITE/AD → WAIT 48 HOURS → EMAIL REMINDER 1

- Conversion → THANK YOU MESSAGE
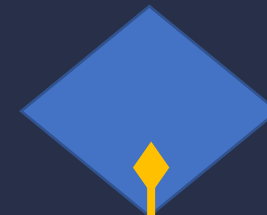- No Conversion → WAIT 3 DAYS → EMAIL REMINDER 2 → WAIT 7 DAYS → FINAL EMAIL REMINDER

Email Goal Setting & Tracking

What is a conversion?

- Transaction-based

- Action-based

- Ecommerce component

- Payment-driven

- Any activity that results in measurable value to your organization
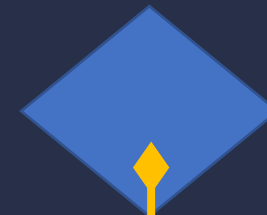
Assigning a goal and meeting it.

What are conversions for you?

By metrics

- Registrations
- Ecommerce Purchases
- File downloads
- Banner ad clicks
- Form sign ups
- Web page visits
- Lead scoring
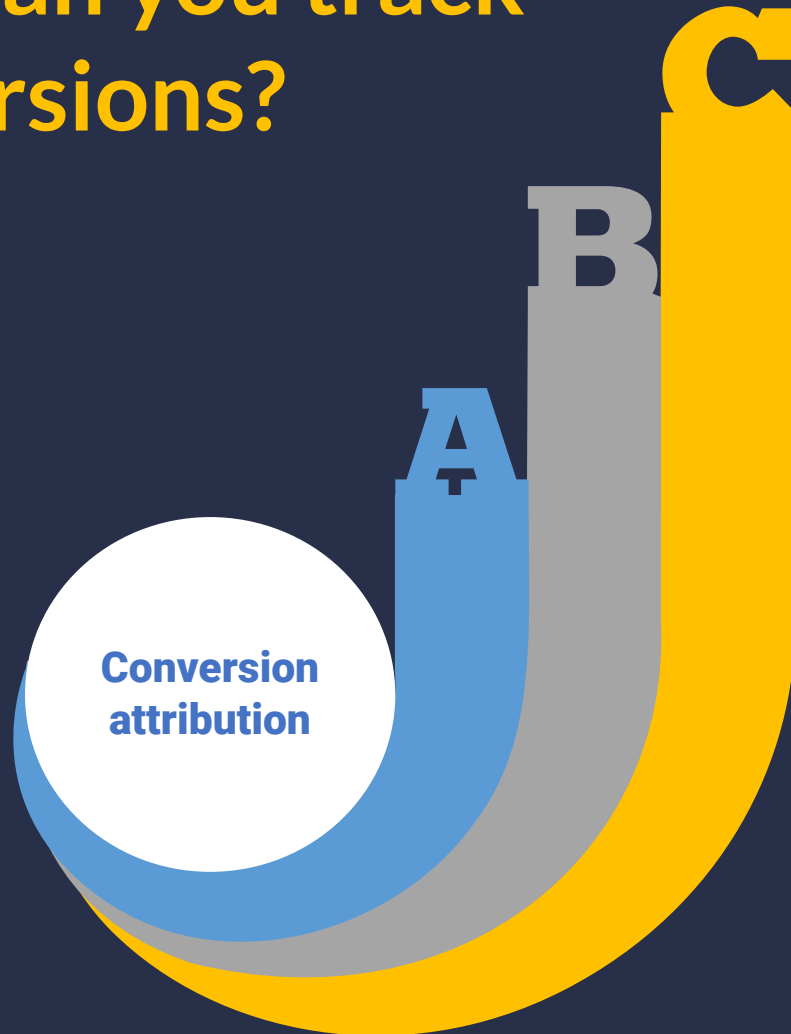- Engagement scoring

By program/department

- Conferences
- Memberships
- eLearning
- Volunteering
- Donations
- Certifications

A customer or member taking action on your goal.

How can you track conversions?

Landing Pages
Measures the success of your nurture funnel or content. Did they hit a landing page within your journey that indicates an interest in x content or x program?
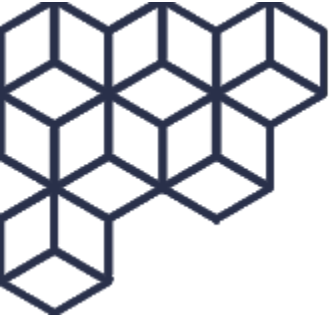
UTM Codes
Measures the success of your campaign. Did they hit a page with a specific tracking code? For instance, did they hit your registration confirmation page?
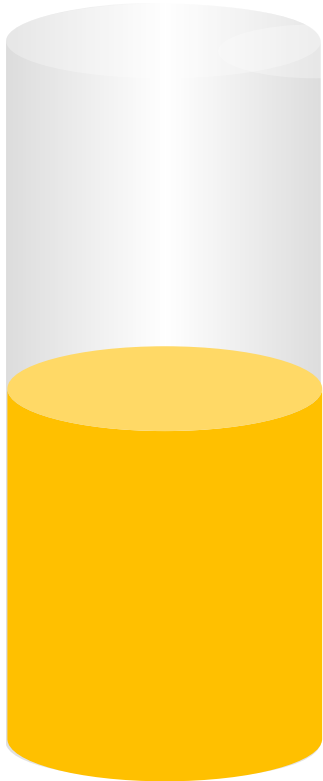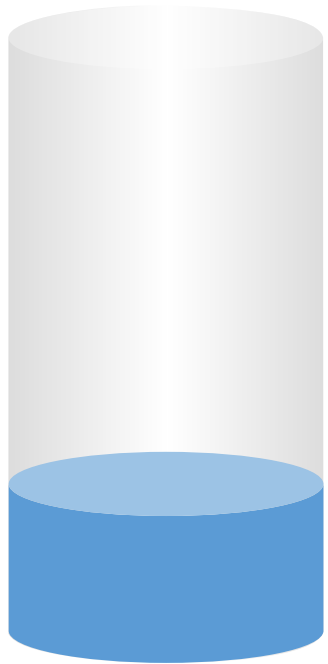
Synced Views (Lifecycle Connector)
When you combine marketing automation with email marketing, you can set-up views (i.e. living lists like registration lists) that you include in your workflows so that you're automatically identifying conversions.

Conversion attribution

Three ways to measure campaigns

Measure interactions

Assigning value to each interaction within your campaign

- Open Rates
- Click Through Rates
- Top Clicked URL Report

Measure conversions

Track journey from campaign to goal conversion (complete action, make a purchase)

- Conversion Tracker
- Conversion Capture
- UTM or Tracking Codes

Measure ROI

Determine ROI based on total conversion value and/or a customer's (i.e. member's) lifespan

Next Steps:

- Schedule your Email Portfolio Assessment Overview

HighRoad Solution™