



THE ULTIMATE GUIDE TO MARKETING AUTOMATION

Say hello to a more effective
communication strategy for your
association

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WHY AUTOMATE?

Associations are increasingly struggling to deliver the customized experience that members (especially younger generations) have come to expect.

Gone are the days where associations can rely on sending weekly, batch-and-blast, one-off emails to their entire member base to meet their member engagement and retention goals.

To be effective today, your communications strategy needs to deliver a personal and valuable experience to members. With marketing automation, you can look comprehensively at your audience's behavior and set up automated, responsive email workflows based on that data. You're delivering members the right content at the right time. And like the name suggests, "automation" saves your staff hours of manual labor - it's a win-win situation.

How does marketing automation differ from email marketing? Learn more in this 2-minute video, **Email Marketing vs. Marketing Automation**.





3 CRITICAL ELEMENTS OF MARKETING AUTOMATION

Marketing automation technology makes it easy to manage the **segmenting, personalization, and timing of your email outreach** to deliver customized content that is increasingly relevant to your audience. This tool saves time by automating repetitive tasks while also creating more effective marketing campaigns, both of which can lead to increased revenue for your association. This guide will walk you through three critical elements of marketing automation:

1. **Understanding your audience + creating personas**
2. **Automated campaign structure + content**
3. **Web tracking capabilities + using data to connect with your audience**

UNDERSTANDING YOUR AUDIENCE

HOW SEGMENTS + PERSONAS WORK TOGETHER

By definition, a **persona** is the way your character or personality is perceived or presented to others. In marketing, when we talk about creating value and relevancy (the key to marketing success), having a sense of who you're trying to reach is key.

And it shouldn't just be a function of marketing. Your organization's personas are something that should be developed and agreed upon by stakeholders organization-wide. That way, your personas drive everything from programs and benefits to customized content and personalized marketing messaging — delivering true value for their entire member journey.



If you haven't developed your target personas or if you haven't revisited them recently, now is the time. You can have as many personas as you need, but we recommend starting with one or two, because it can get overwhelming quickly. It's best to revisit these on a regular basis to expand and refresh as needed.

A **segment** is your actual email list, broken down into groups of real people, based on real data. For example, it could be based on age, job title, membership level, etc. With the data you gather through marketing automation, you can hyper-segment your list. This can be based on more than just demographics: Behavior like clicks, time spent on page, and so on.

Personas:

- Fictional people who represent certain portions of your audience
- Help you plan content for your messages
- Based on observations and data

VS

Segments:

- Real sections of your email list
- Help you target your email messages
- Based on known data

CREATING PERSONAS

Audiences often break down by titles, roles and responsibilities, work environment, and motivations. To identify which personas you will develop, begin by looking at an audience type that is vital to your organizations' mission and goals.

Use the commonalities among your answers when developing your personas. For example, consider an engineering association. When looking at the makeup of their membership, they might decide to have personas for executives in engineering firms, professional engineers, students in engineering, and engineering educators.

GATHER YOUR DATA

Once you know what personas you want to have, go to your database to see what data you can collect on them, such as gender, age, job title, location, etc. Then take a deeper dive into questions related to what their environment is like, what motivates them, and what their aspirations are.

In addition to your database, other ways to collect this type of information are through **surveys, interviews, and focus groups**. If you have an association-wide investment in persona development, you can work the collection of this data into your strategic plan and leverage multiple channels and staff to help collect this data. For example, use registration forms, follow up surveys, or face-to-face meetings as opportunities to gather insights.

Make sure to give your persona a name that best describes them and try to assign a picture. Remember, this is not a real person. The goal of this exercise is to develop a deep understanding of your audience at a human level so that you can customize your brand experience for them. Personas should be research-based, fictional representations of your ideal member.



**EXAMPLE PERSONA:
CATHY COUNSELOR**

Cathy is an addiction professional working alternately in private practice as well as at a treatment facility. She comes into contact with patients that may exhibit addiction symptoms. She needs to be able to recognize the signs of substance abuse and be equipped to lead the diagnosis, recommend a treatment plan, as well as provide clinical services.

She has personal experience with addiction and feels strongly about helping others. The work can be very fast paced and stressful. Her job requires continuous education certificates in order to maintain her credentials and continue working in the field. Without employer education assistance, she must find free or low-cost educational resources to make ends meet.

BRINGING PERSONAS TO LIFE

The data, which we like to call the “head” portion of your persona, is first, but uncovering the “heart” of your persona is what will really bring it to life. To get to the heart knowledge, you need to understand the needs, expectations, motivations, values, attitudes, and behaviors of your audience.

People donate their time and money, support a cause, or make a purchase based on how they feel. Discovering what truly matters to your personas will enable you to be intentional in why your organization should matter to them.

Now that you understand what a persona is and how personas can elevate your messaging and drive your organization’s services and offerings, it’s time to gather your stakeholders and develop personas.

Use the worksheet on the next page to drive the conversation and uncover your personas’ challenges, motivations, and typical workday. Spend some time crafting a narrative like the one to the left to help you visualize your persona.

PERSONA DEVELOPMENT WORKSHEET

Association Strategy

Personas are an effective tool to put your audience front and center and keep them in your line of sight. Personas help you develop better strategies by objectively looking at your association's website, imagery, content, and value proposition through the eyes of the persona.

Dialing into Your Audience

Are your members a homogeneous group? If not, there are at least two distinct groups that warrant persona development. Audiences often break down by titles, roles and responsibilities, work environment, and motivations. Begin with an audience type that is vital to your organizations' mission and goals.

- Describe the work environment for your audience (ie: office job, field work, nontraditional hours, night jobs, weekend jobs)?
- What are they entrusted to do?
- What do they need to be successful?
- What do they value?
- Why did they choose this profession and why do they stay?
- What's the outlook for the future?
- What are their biggest challenges or concerns?
- How is your association/organization important to their lives?
- What do you uniquely provide?
- What emotions/feelings do you want to evoke in your audience?

AUTOMATED CAMPAIGN STRUCTURE + CONTENT

IMPLEMENTING AUTOMATED CAMPAIGNS

Think about the steps that go into planning and executing email campaigns. Do you use a whiteboard to visually flow out comprehensive marketing campaigns? Do you purposefully plan your response to actions that subscribers take? Do you want the communications to have a personal touch, much like the ebb and flow of verbal communication? You can do all this and more with marketing automation. Automating campaigns will make your organization more efficient and more effective, helping you:

- Reduce manual work
- Improve response to subscriber activity from multiple marketing channels
- Enhance campaign planning with visual, end-to-end process flow
- Create a consistent constituent experience with campaign continuity
- Document campaign purpose, goals, audience, etc.
- Improve strategy scope without increasing labor costs
- Measure ROI





GETTING STARTED WITH AUTOMATION

Knowing you want to automate a marketing campaign is great, but planning out your process will help you get started.

Map the Process Flow

Let's say you're planning a road trip with your family. You probably know where you want to go, but maybe you're not quite sure how to get there yet. You pack your bags (content), you load up your family (personas), and you set off for your destination. As important as it is to pack the right clothes and not leave anyone behind, knowing how to arrive at your destination is key, and a trip without a map may be costly. Before you begin setting up your campaign, **map** out how the campaign will run. Some questions you should ask yourself:

- **How long should the campaign run?** Is this a simple campaign, like a welcome series, or is it a more involved reengagement campaign?
- **What steps should be involved?** A welcome campaign may consist of a few mailings, but an event may require more complex emails based on who has registered.



- **What is the ultimate goal of your campaign?** Are you simply sending a newsletter and putting pertinent information in front of your members, or do you need to reach a member renewal goal of 30%?
- **How are you defining success for this campaign?** Do you need to reach 100 attendees for a webinar or obtain a membership goal, or are you simply looking to hit certain email engagement metrics?

Answering these questions ahead of time and mapping out the various steps your members will need to take will make it easier to construct the campaign.

Create Relevant Content

At its core, **a campaign is a series of mailings structured in such a way that they reach your recipients at a set time or after a set action.** Automating a campaign allows you to set everything up ahead of time and analyze the performance as it runs, rather than having to worry about creating content at each step individually.

Even though we are setting these messages up in advance, we want to make sure the content included in those messages is as relevant as possible. As you build your campaign, be mindful of where in the journey your members are and what message you want conveyed to them at that point in time. The message at each step should be unique and deliver value that previous messages did not.

For example, consider a welcome campaign. Each mailing should contain a new feature, a new benefit to their membership, or a new piece of information that helps to move them along the path and reach the ultimate goal you have set for them.

Depending on the campaign, the message may only vary slightly, but you don't want your members to feel you are just restating the same idea over and over.

Analyze Performance and Remain Flexible

As you go, remain actively involved in your campaign to see if there are any areas where you can improve. For example, if open rates aren't where you want them to be, try different subject lines. If members aren't clicking into your content, reconsider whether the content you're sending lines up with the intended segment or persona. Analyze email metrics and the performance of the campaign as it goes on so you can continue to achieve your goal of delivering a personalized, relevant experience to members.



5 CAMPAIGNS TO AUTOMATE

After the prospect signs and becomes a customer, your Association Management Software (AMS) or Customer Relationship Management (CRM) platform collects and organizes data, including their community activity and where they are with implementation. A campaign-based marketing approach will help you deliver relevant information, beginning with the first interaction you have with a subscriber and continuing throughout the entire lifecycle of the subscriber relationship. In this section, we'll cover just a few examples of automated campaigns that will nurture relationships with subscribers throughout different stages of their journey.

Welcome Campaign

Send the first automated welcome email within 24 hours upon capturing a new email address of a prospect or new member. This is the time to roll out the red carpet with a warm welcome and to reinforce the benefits and value of being a member of your organization. Shine light on proven value drivers like access to an exclusive online community, educational resources, industry events, mentoring opportunities, and more.





As a best practice, a welcome campaign should include a series of purposeful communications sent over the first few weeks of a member joining your organization. Think of this as an onboarding vehicle to equip new members with information to successfully engage with your organization.

When crafting your campaign, think back to your personas. Why is your audience coming to you? Provide a solution right away. Consider these items as you develop your welcome campaign:

- **Member Login Information**
- **Link to Complete Online Community Profile**
- **Tutorial Welcome Video Link**
- **Accredited Educational Courses**
- **Networking Opportunities**
- **Mentoring Opportunities**
- **Member Discounts**
- **Key Contact Information**
- **Industry Newsletter**
- **Testimonials**
- **Volunteer Opportunities**
- **Fundraising Events**

Member Appreciation Campaigns

Seize the opportunity to connect to members in a meaningful way by recognizing birthdays, anniversaries, special occasions, or thanking them for their contributions. These campaigns are easily automated because they're triggered by a behavior within your database. With an integrated community, you have more robust data to support personalization and relevancy in your appreciation emails. You might thank members for actions like becoming a mentor, participating in a discussion, or volunteering. Expressing appreciation can go a long way in fostering strategic engagement and loyalty to your organization.

Engagement Campaigns

Activities such as form submissions, web page visits, course completion, or clicking on specific email links provide you with information that can trigger automated relevant follow-up communication. We typically think of responding to what members do, but we can also proactively respond to what they don't do. Inactivity can be a trigger as well.

For example, members that haven't opened an email in a defined time frame (3+ months) could be sent an automated campaign with specific calls to action to re-engage the member. A continued non-response would trigger additional follow-up communications with a strong and compelling reason to re-engage. As part of any re-engagement campaign, you want to explore all viable channel options for reaching members, especially if one channel is suddenly not producing results.

TOP 5 AUTOMATED CAMPAIGNS FOR ASSOCIATIONS

Download this worksheet to get an outline of the campaigns associations should run on a daily basis.

AARC Brought Back 800 Lapsed Members with Automated Win-Back Campaign

The American Association for Respiratory Care's (AARC) membership was stalled. The steady decrease in membership renewals gave rise to the growing number of lapsed members. Knowing new member cultivation would not be a quick and easy fix, AARC identified great potential within the growing lapsed member base.

They developed a win-back strategy to reach out to prior members to generate interest and encourage them to rejoin AARC. This strategy, combined with an automated campaign and various tests to improve their message, **led to nearly 800 members rejoining the organization, bringing in over \$64K in membership dues in only 45 days.**

AARC attributes their success to a new spin on an old strategy and automated campaigns.



SHERRY MILLIGAN

Former Associate Executive Director of Communication
American Association for Respiratory Care

“Use tools to help you automate and generate emails. None of us have the time to constantly be manually sending out emails of this kind. It makes perfect sense to automate.”

Nurture Campaigns

Similar to the welcome email series, a nurture series should effectively reinforce an organization's core purpose and strengthen membership. The renewal campaign delivers membership value, affirms accomplishments that map back to the core purpose, appeals to future needs, recognizes member participation, and motivates renewal. Automated nurture campaigns can be set up to trigger at predefined time periods calculated from a member's join or renewal date.

Win-Back Campaigns

If you notice the number of non-renewing, or lapsed, members growing, a campaign designed to win back their membership may be needed. While a re-engagement campaign concentrates on current members that have decreased their engagement with your brand, a win back campaign focuses on members you have temporarily lost. The content of your message should concentrate on the value the subscriber gains from their membership with you. Be concise and make renewing their lapsed membership a simple process.

[Download AARC's 4-Step Strategy for Lapsed Members](#)

AUTOMATED CAMPAIGN PLAN WORKSHEET

Sketch/outline the campaign flow. Include target-specific information and specific times for when emails need to be sent. Think through decision and notification steps and the exclusion of subscriber groups from the campaign.

- What is the goal of the campaign?
- How will it be measured?
- What subscriber groups will be needed (starting group, exclusion group, conversion group, etc)?
- Will subscribers be added at once or over time?
- Is there a hard deadline for completion? If so, what is the date?
- How many emails should be in the campaign?
- Define the timing between each email.
- Is there a follow up opportunity (abandoned action, resend to non-openers, etc)?
- If yes, define and create the appropriate follow up content.
- Should a sign-up form or landing page be part of the flow? If so, what is the URL?
- List name of email messages built for campaign.
- Conclusion: What were the results?

WEB TRACKING CAPABILITIES

USING THE DATA TO CONNECT WITH YOUR AUDIENCE

Web tracking may not be the first thing that leaps to mind when you think about marketing automation, but it should be. Like perfecting a golf swing, marketing automation is all about the follow-through, and combining web tracking with automated campaigns is exactly the prep you need before stepping out on the green.

Web tracking is an **insight** and **action** tool to help you better understand and interact with visitor activity on your website. This capability can be a gamechanger for your organization as it allows you to customize and delight your audience by noticing and meeting their unspoken needs.

Modern digital marketing is all about data. Google Analytics is one type of web tracking that can provide insight on visitors interacting with a web site, and many communications platforms now have web tracking baked in as well. There's plenty of helpful takeaways provided by these tools.

Good web tracking goes beyond these initial visits. The benefit of using a platform with web tracking built in is it can actually determine the identity of some of your web visitors. If they already subscribe and are listed in your database, the use of cookies can now pinpoint exactly which of those subscribers are going to your web site, and what they did once they got there.

How Does Web Tracking Work?

Getting started with web tracking, a cookie-based tool, simply requires adding snippets of JavaScript code to web pages on domains that you own. You will immediately begin to gain insights into the activity your subscribers have with your website after just one click-through from an email. Just like the storefront scenario, this puts you in the midst of your audience and equips you to make personal connections with as many as you choose.

What Types of Activity Can I Track?

Better understand how your visitors use your website, and target emails to your subscribers based on website activity. This opens up the opportunity to KNOW your audience and to ACT on that knowledge in a way that wasn't possible before.

- **Page Views** — individual webpage visits
- **Page Interactions** — “call to action” activities such as downloads, form submissions, and video plays

Does Web Tracking Take the Place of Google Analytics?

No, not at all. While both tools report website activity, they each serve a very different purpose. Google Analytics is a comprehensive analytical tool for measuring website effectiveness and performance. Web tracking is an insight and action-based targeting tool, primarily used for marketing and communication purposes.



PRECISION TARGETING WITH WEB TRACKING

Create meaningful connections with your audience by leveraging the power of web activity. The ability to tie web activity back to an individual subscriber gives you precise targeting power. Creating a targeted list based on web activity lets you customize the user experience for your audience. With tracking, you are well equipped to make personal connections with your audience. The choice is yours and the possibilities are endless.

For example, **page views** are one way that web tracking can provide data for automated campaigns.

Page views can be a great source of information when it comes to marketing to your audience. Not only can you review this data to see how specific pages on your website are performing, you can also utilize this data to target your content more effectively.





The page view metric shows the total number of pages viewed by a visitor on your website, including repeated views. Not only does it show pages people are viewing, but it helps to communicate how effective content on the website is and the quality of which it is presented. When reviewing the performance of your website, understanding page views can be particularly important for a few reasons:

Display Ads

If your organization gains revenue through display ads, page views are a really relevant metric to possess. In this scenario, each page view would also count as an impression, meaning how many times that ad has been displayed.

Measuring Content Adoption

When launching a new section on your website, you probably want to make sure people spend time reviewing new content that has been added there. Understanding how many times visitors are navigating to a particular web page will help you either have confidence in how the content is being presented, or identify potential issues allowing you to adjust more rapidly.

Members-Only Content

If your website has a section reserved for paying members, reviewing the page views for these sections can illustrate whether or not members are taking full advantage of their memberships. Page views are an indication of how engaged people are with your brand. Just as you can adjust our marketing plans based on email engagement, you can leverage website analytics to customize messages and reach out to your audience in a new way. Page view data gives you additional subscriber insight to create automated campaigns dictated by their website behavior. Here are some examples of campaigns for current subscribers based on page view data:

- **Members Only**

Identify members not using the members-only area and therefore missing out on great content. Create messages that outline some of the content they may be interested in and reinforce the benefits of membership to increase content adoption.

- **Low Page Views**

Identify subscribers not actively visiting your website and create messages targeted towards driving them to great web content.

- **Recommendations**

Have more content related to the pages users are visiting? Evaluate pages viewed and provide recommendations for similar content and resources.



CREATE A PERSONAL, VALUABLE MEMBER EXPERIENCE

It's harder than ever to get your members' attention, so make sure you're using the right tools for engagement. With marketing automation, you have the ability send relevant and personalized content, segment your audience, and deliver the content individual subscribers want and need. You're not just popping their name into an email - you're actually sending them content that they want to read. And how do you know that? Marketing automation is tracking their interests for you.

By upgrading your email tool to incorporate marketing automation, you'll be able to deliver more timely, relevant and personalized messages that align to your recipients' needs, making your communications strategy more robust and effective than ever.

[Let's Connect](#)

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