

A decorative graphic in the top-left corner consisting of a grid of white-outlined hexagons, some of which are slightly offset to create a 3D effect.

**Webinar:**  
How marketing  
automation leads  
to marketing  
transformation



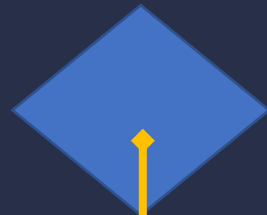
# What we'll cover

1. Transformation vs operational efficiency
2. Marketing automation vs email automation
3. Justifying marketing automation
4. Preparing for marketing automation
5. What it looks like if you're not set-up for success
6. What transformation looks like



# 1 Transformation vs operational efficiency





## Marketing automation

It isn't about operational efficiency. It's about transforming the way you go to market.

# Marketing transformation



Data



Integrated channels



Branching



3 days

3 days

# Operational efficiency

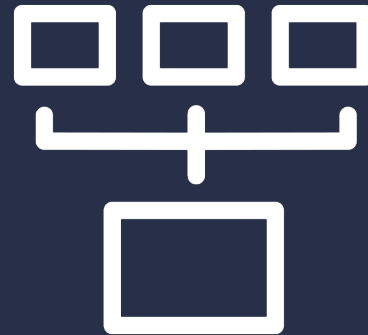
# 2

## MA & EA



## Email Automation:

Is a software that allows organizations to automate their email communications through data-driven triggers and filters for better list segmentation and, in some cases, greater operational efficiency.



## Marketing Automation:

Is a software, and movement, that allows organizations to automate their marketing funnel through intelligent, data-driven multi-channel approaches that nurture prospects to conversion.



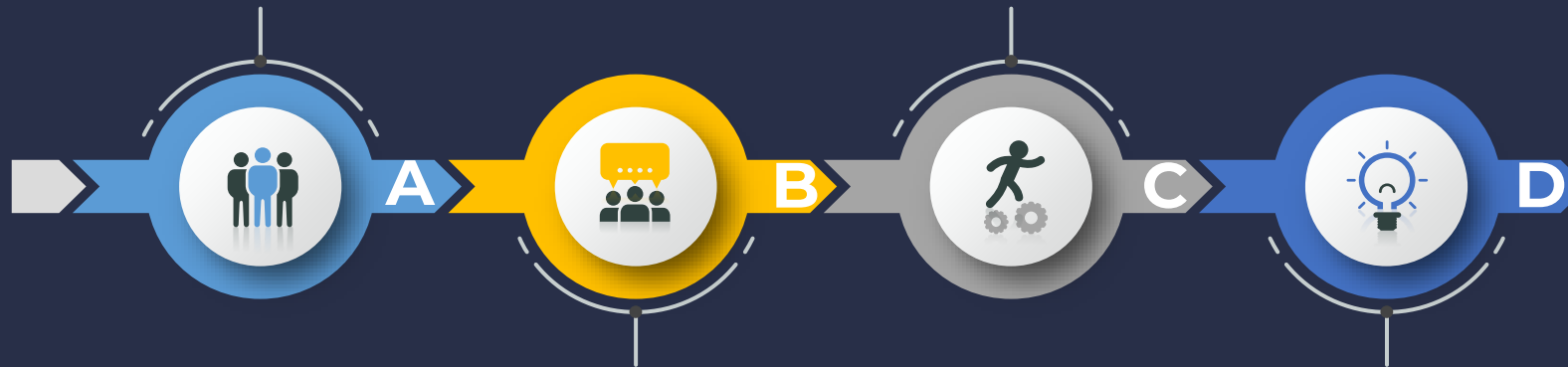
# Email automation

## Segment a list

By demographics, buying behaviors, email preferences, membership status

## Give them what they need

Through conferences, webinars, committee participation, credentialing, etc. specific to their interests




## Fulfill your member promise

Inform, motivate, retain, engage for renewal

## Retain and delight them

Convert them to organizational champions, retain them, keep them active in the community





# Marketing automation

## Push content

Through social media, paid, web, etc.



## Learn about them

Through forms and persona identifying questions



## Educate them

Help them be better. Help them do their job better.



## Disqualify them

Leave them alone if they're not a good fit



## Give them what they need

Provide solutions to their challenges.



## Convert them

Ask them to take action.



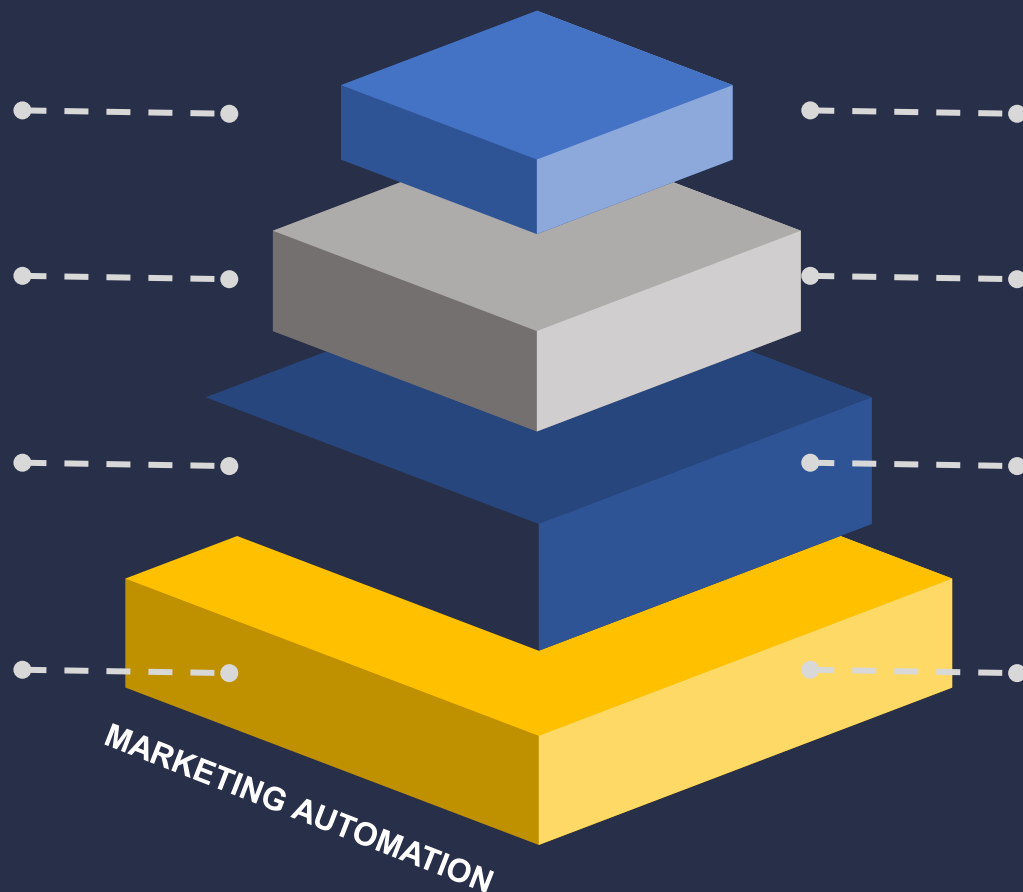
## Key approach differences

### Goal/Approach

- › Acquisition-focused
- › Inbound communication
- › Omni-channel
- › Behaviorally-driven
- › Individualized cx
- › Sales-driven

### Functionality

- › Social media/web/email
- › Lead scoring
- › Conditional content
- › Persona builder
- › Forms and landing pages



### Goal/Approach

- › Retention-focused
- › Outbound communication
- › Email is the only channel
- › List-driven
- › Mass cx
- › Member value-driven

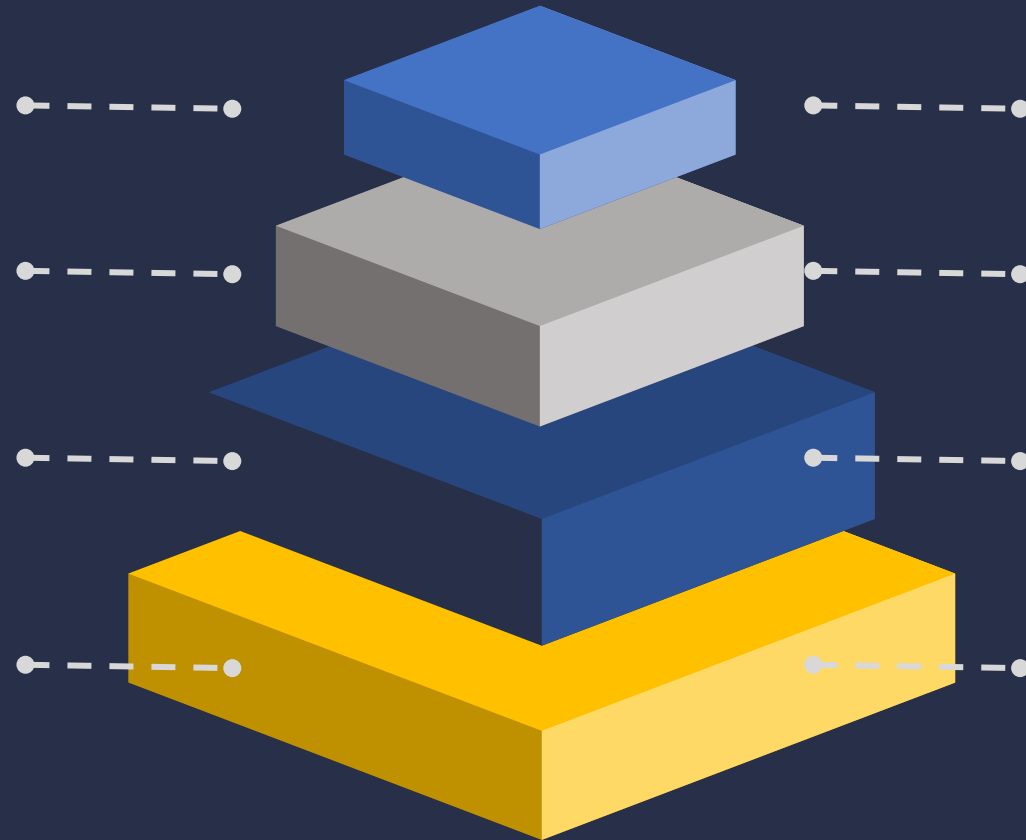
### Functionality

- › High volume email sends
- › Automated emails
- › Conditional content
- › Basic form/landing page

# Key communication differences

## Campaign/Cx

- › Awareness campaigns
- › Member recruitment (lead gen) campaigns
- › Campaigns upgrading superficial membership categories with no price tags (i.e. provide first name, last name, email)
- › Campaigns converting customers to members



## Campaign/Cx

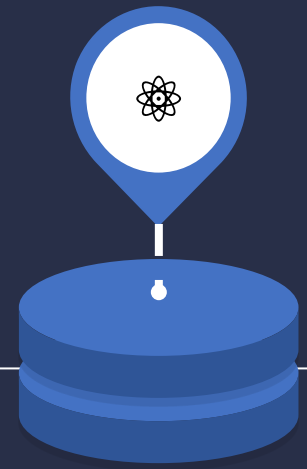
- › Member onboarding communications
- › Renewal communications
- › Promotion of relevant programs as part of member promise
- › Member newsletters
- › Sponsored (sold) communications

# 3 MA readiness

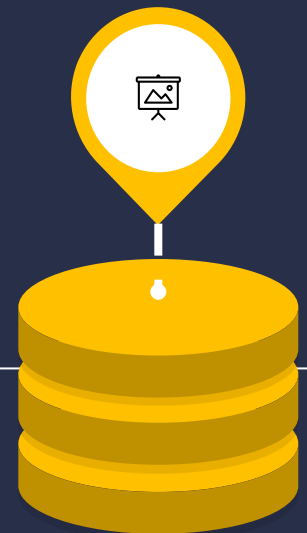




**MA  
readiness**



**Are your  
goals  
aligned?**



**Do you have  
leadership  
buy-in?**



**Is your  
organization  
culturally ready?**






## Are you looking to grow revenue?

Grow membership  
Retain membership  
Diversify your program portfolio

## Are you looking to gain insight?


Learn more about your audience  
Enhance member value  
Forecast the future of your organization



Are  
your  
goals aligned?

## Are you looking to create operational efficiency?

Create cost savings  
Refocus resources on strategy  
Retain staff





### Do they have the means to invest?

and evolve your martech stack

### Do they have a solid understanding of ROI?

as it relates to your organizational goal(s)



### Are they clear on efforts, resources, and timing?

in terms of outcomes and ROI






## Does your team have the right skill sets?

Do you have the right staff mix?  
Do you need to fill gaps with other staff resources?  
Do you need consultants to supplement?

## Are they appropriately trained and supported?


Can they strategically build your approach?  
Are they technically trained on the technology?  
Can they work with the technology and not against it?



Is your  
organization  
culturally ready for  
the change?

## Do they understand the level of change they need to make?

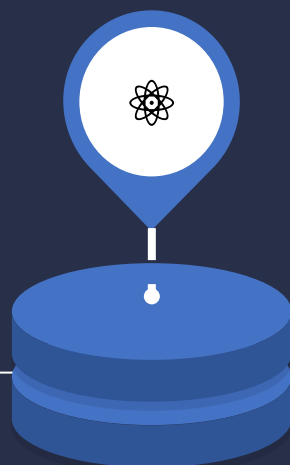
Do you have a change management plan?  
Are you being transparent?  
Are you educating them on all the interdependencies?





4  
MA  
success





Do you have the  
right roadmap?



Do you have the  
right tools?



Do you have the  
right partners?





## Are they aligned with your budget?

Do you have a strong business case?

## Will they help you with your goals?

Now and in the future.



## Will all your systems be integrated?

Is your data centralized?




## Do you have a clear vision?

Do you have a clear plan and timeline for integrating your tools, equipping your organization, and producing results?

## Have you shared your vision?

Do your staff and leadership have optics into your vision, including the interdependencies?



Do you  
have the  
right roadmap?

## Have you shared this vision with your tech partners?

Your existing partners more than likely already have guidance



### Are they a partner and not a service?

Does their expertise go beyond product knowledge?

### Do they have sight to your objectives?

Do they know what you're strategically looking to accomplish?



### Are they unbiased?

Do they have unbiased views into your business and processes?



# 5

## What it looks like if you're not set up for success





## Universal association issues

### Delivery issues

Delivery numbers decreasing considerably given the inherent design of marketing automation tools intended to focus on the *consistently engaged*



### Product adoption

Mainstream automation platforms (for profit by design) don't know associations, and have robust functionality yet adhere to a 'self taught' training philosophy

### Activity tracking issues

Member event (demographic or behavioral) data not translating to marketing automation system because data came in through disconnected forms



## What causes these reputation issues

### 0-open threshold



If a contact hasn't opened any out of 11 consecutive emails, they'll be flagged in your platform. You can still send to them by unchecking the 'Suppress the Unengaged' box.

### 1-open threshold



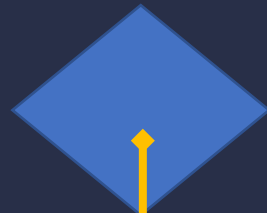
If a contact has only opened 1 of 16 consecutive emails, they'll be flagged in your platform. You can still send to them by unchecking the 'Suppress the Unengaged' box.

### Quiet impact



After sending to the consistently engaged, you'll start to get a bad sending reputation.





**The tool isn't broken.**

It's doing exactly what it's designed for. To get you focused on growth and opportunity.



## What will happen with a bad sending reputation

01


Reporting *may* look good on screen, but your messages will start to get blocked by your recipients' IP without you knowing it

02

Your MA platform compliance team will step in and restrict your sending status until you implement a sustainable remediation plan


03

Unless your members tell you, you may not know that your emails aren't going through until your sales numbers are impacted



# 6 What transformation looks like





What success  
will look like if  
you transform your  
go-to-market approach

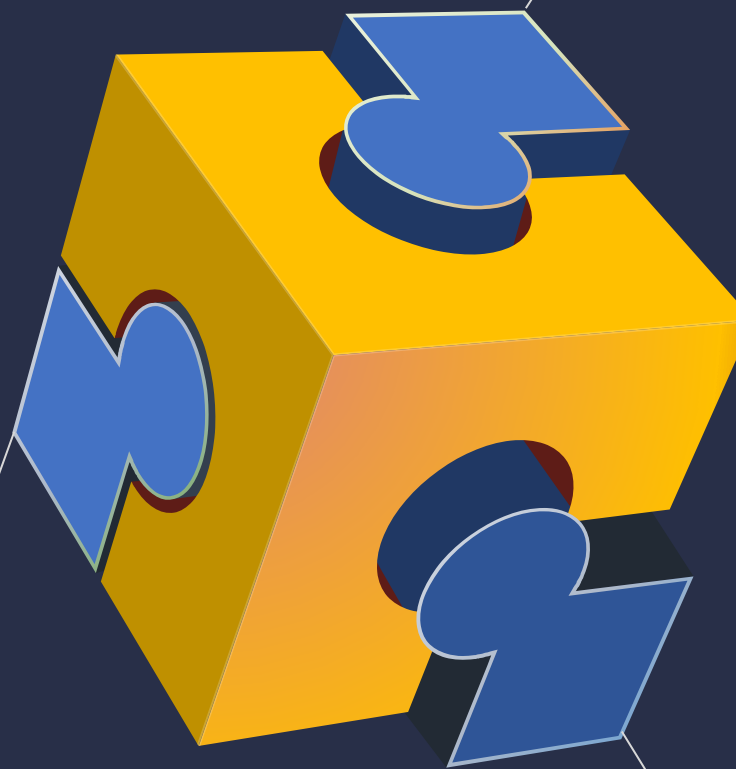
Lead scoring that  
assesses overall levels  
of engagement



Persona-based campaigns that  
are goal tied, trackable, and  
data-driven



Audience and industry  
insights to help map out  
programmatic content





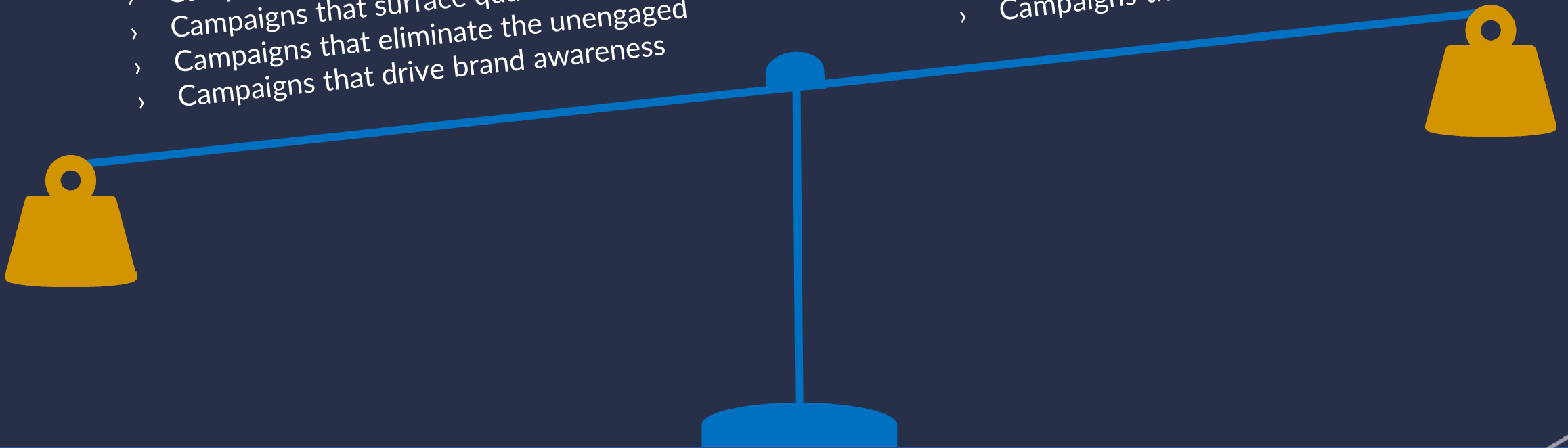
## Transformation is growth-focused versus operationally-focused

### Growth focused

- › Data-driven campaigns
- › Campaigns that provide intel
- › Campaigns that drive conversions
- › Campaigns that surface qualified leads
- › Campaigns that eliminate the unengaged
- › Campaigns that drive brand awareness

### Operationally focused

- › Campaigns that save time



Questions?

