

Marketing Automation with Raise the Roots

Joe Gallant, Account Services Manager, Engaging Networks

Alysa Ojeda, Marketing and PR Manager, Grand Canyon Conservancy

Gabby Green, Email Marketing Manager, Humane Society International

Brandon Fuller, Owner, Raise the Roots

Agenda

- Introductions
- Update on Marketing Automations
- Examples of Innovative
- Automation Designs
- Case Study Panel
- Questions

New Features: Out of box MA

Create a new Marketing Automation

Choose the type of automation you would like to create:

Welcome Series



Engagement



Decide on what your objective should be. Do you want to reactivate supporters? Or do you want to send emails to newly signed-up supporters asking them to take their first action? It is good to be clear on this, and choose one clear objective, as this will make the set-up process easier and will likely make the automation more successful.

New Features: Smart Inserts

Adding a condition



Conditions are now grouped into main categories which determine what kind of information your condition will be evaluating. The conditions are checked after the time given by the previous Wait box. At this point, the automation will determine which supporters continue down which branch.

New Features: Smart Inserts

Email Response



This type of condition will look at how a supporter interacted with an email sent out by the automation. You can look at whether a supporter completed a recurring donation, made a single donation, 'converted' via a page, e.g took any advocacy or other action they were invited to in the message, other than donating, and also whether they clicked on a link within the email or just opened the message. You can also set up a condition for supporters who were just sent the email, but did not open.

New Features: Smart Inserts

Supporter Information



Your Account Data Structure contains many fields which contain values that you can look at to decide which branch of your automation would be most appropriate for them. You can also grab supporters who have a mobile number.

New Features: Smart Inserts

Donation Information



By looking at your supporter's donation history with you, it is possible to create tailored journeys based on their level of donor activity.

New Features: Smart Inserts

Mobile Response



If the previous action was an SMS send, you can determine what to do when the message was successfully delivered to the mobile phone number provided, and also what to do if the message remained undelivered after the wait period.

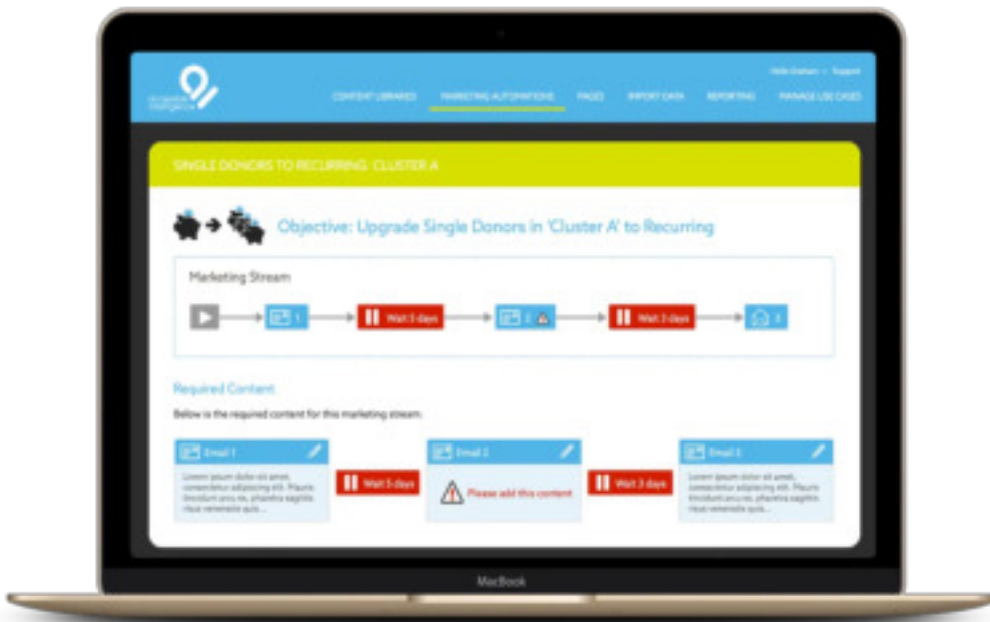
New Features: AI-powered Marketing

This new set of tools is being released in November 2019 in your Engaging Networks account. Let us know if you would like to be part of the pilot launch.

The launch is focused on a single digital objective: convincing single donors to become monthly donors.

More use cases will be launched in 2020, including:

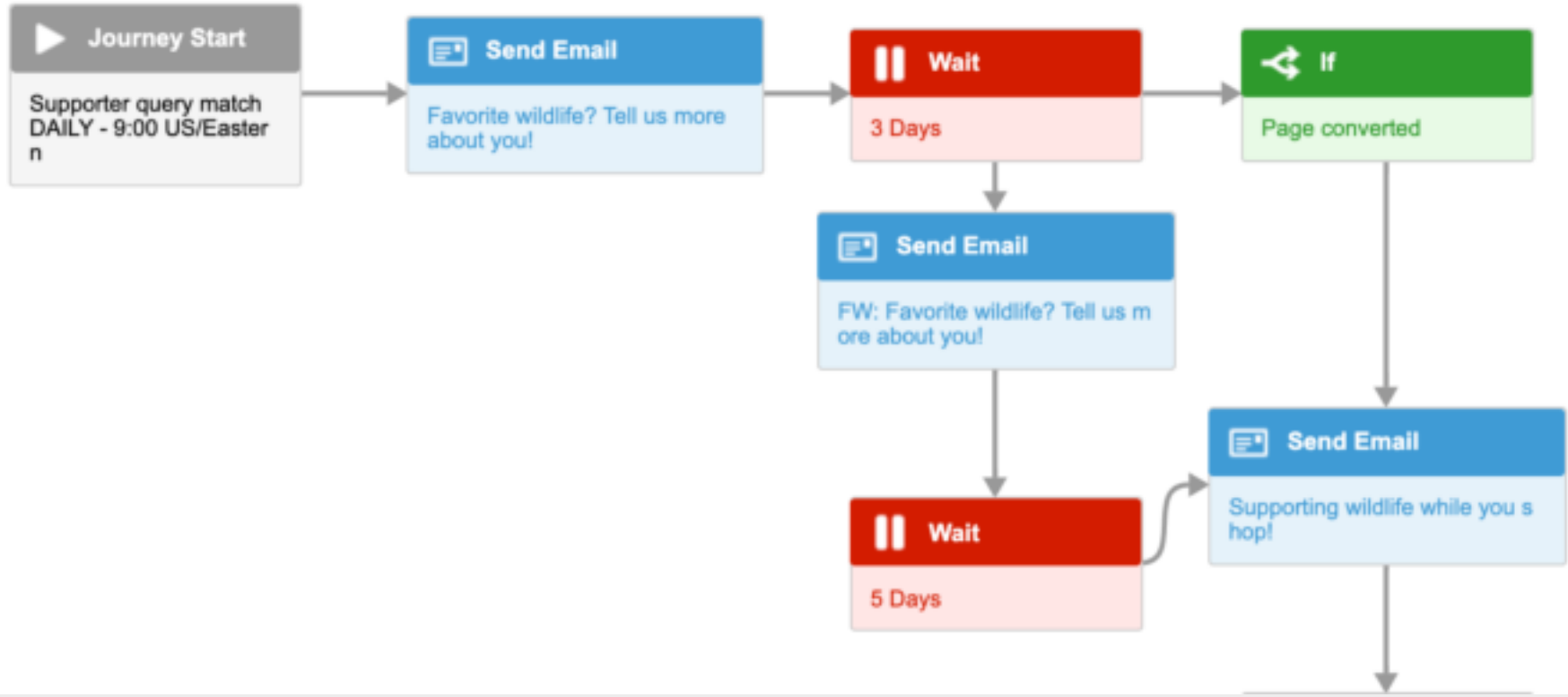
- increasing the engagement of activists, and
- convincing activists to become donors



Innovative Automations

- Six-Month Welcome Series
- Data Capture Welcome Series
- "Abandoned Cart" Series
- Membership Renewal

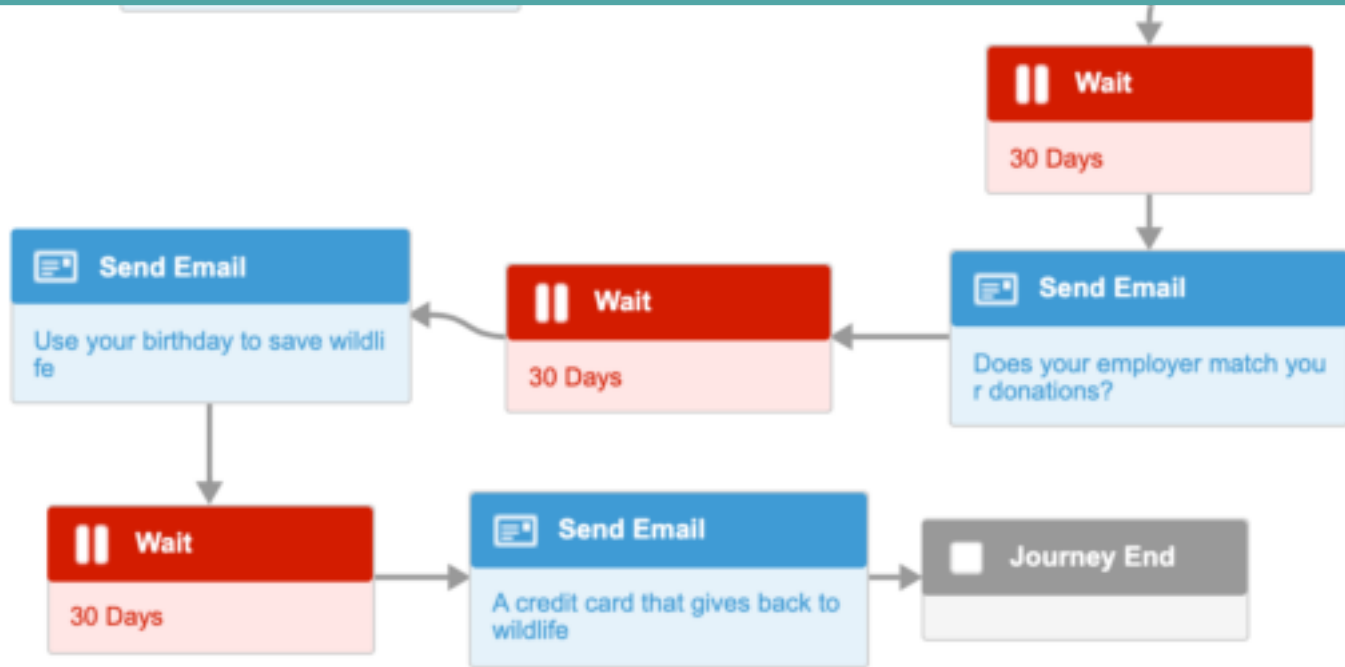
Six-Month Welcome Series



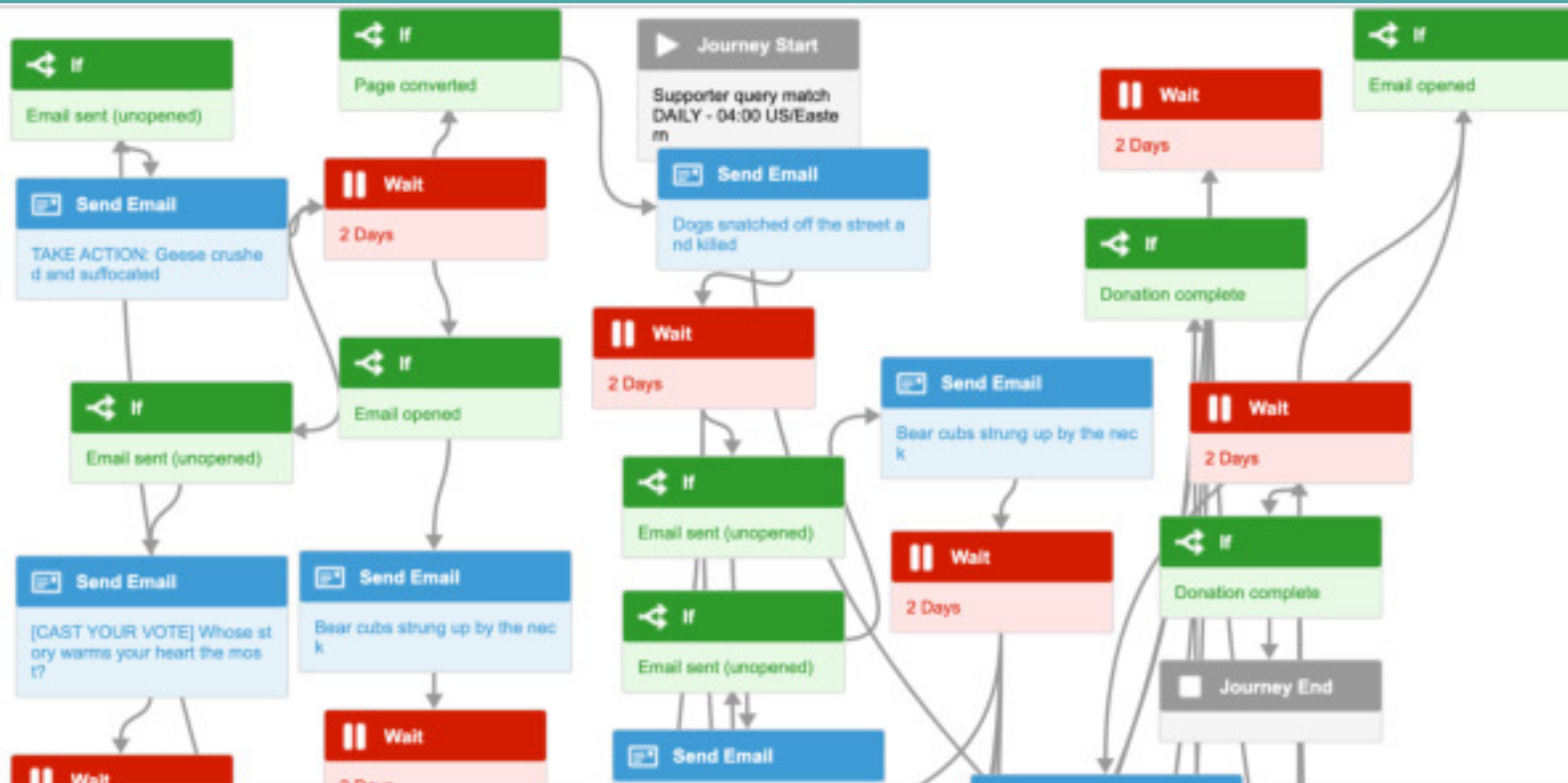
Six-Month Welcome Series



Six-Month Welcome Series



Data Capture Welcome Series



"Abandoned Cart" Series



Membership Renewal

<input type="checkbox"/>	Renewal Series - 2 Months	INACTIVE	03/07/2019						
<input type="checkbox"/>	Renewal Series - Expired	INACTIVE	03/04/2019						
<input type="checkbox"/>	Renewal Series - 1 Month	INACTIVE	03/04/2019						
<input type="checkbox"/>	Renewal Series - 3 Months	INACTIVE	03/04/2019						

Membership Renewal



Case Study Panel

Alysa Ojeda, Marketing and PR Manager, Grand Canyon Conservancy

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Questions?

Any Additional Information

Joe Gallant, Engaging Networks – joe@EngagingNetworks.net

Brandon Fuller, Raise the Roots – brandon@WeRaiseTheRoots.com

Alysa Ojeda, Grand Canyon Conservancy – aojeda@GrandCanyon.org

Gabby Green, Humane Society International – ggreen@HSI.org