TAKING MARKETING AUTOMATION TO THE NEXT LEVEL

Using SMS in your welcome series

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Introduction

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- Work out of the office in Washington, DC

- Joined the Engaging Networks team in July 2018

- Prior to joining Engaging Networks, I worked for a children's literacy non-profit, Reading Is Fundamental

Today's Session

SUMMARY

- Engaging Networks Marketing Automation tool

- Building elements of an automation and incorporating SMS (including how to test)

- Example automations including welcome series, birthday, and reengagement automations

- Automation reporting

Marketing Automation

WHAT IS A MARKETING AUTOMATION?

- Marketing automation allows you to automate communications to supporters.

- Entry criteria and decision conditions can be highly customized for a curated supporter experience.

- You can now incorporate SMS into these automations

SMS Marketing

WHY INCLUDE SMS IN YOUR AUTOMATIONS?

- Open rates as high as 98% (higher than any other channel)

- Accessible to more supporters

- Multi-channel engagement

- Great excuse to use more emojis in your marketing
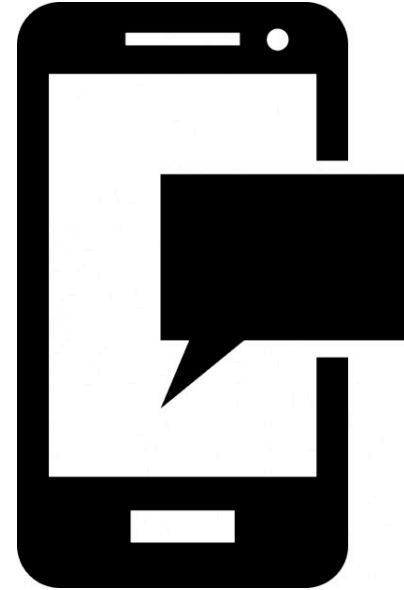
Getting Started

ADDING SUPPORTER MOBILE PHONE NUMBERS

- Add a field in account data structure tagged to "Second Phone Number"

- Phone numbers must be in the E.164 format which includes country code (example: +17034732818)

- Separate opt in for SMS

NEW DECISION CONDITION FILTERS AND USING SMS IN AUTOMATIONS

- Lets login to the software!

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Welcome series

SETTING UP A WELCOME SERIES IN ENGAGING NETWORKS

- Supporters can only be new once

- You can have multiple welcome series

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Birthday Automation

SETTING UP A BIRTHDAY AUTOMATION

- Need to create a supporter birthday field tagged to "Supporter Birthday"

- Birthdays must be formatted as YYYY-MM-DD

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Reengagement Series

SETTING UP A REENGAGEMENT SERIES

- Use profiles to target lapsed supporters

- New decision conditions make it easier to account for different scenarios

Reporting

How to view your automation metrics

DIFFERENT REPORTS

- Downloadable automation report

- Visual automation report

- Query tool

Thank You.

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