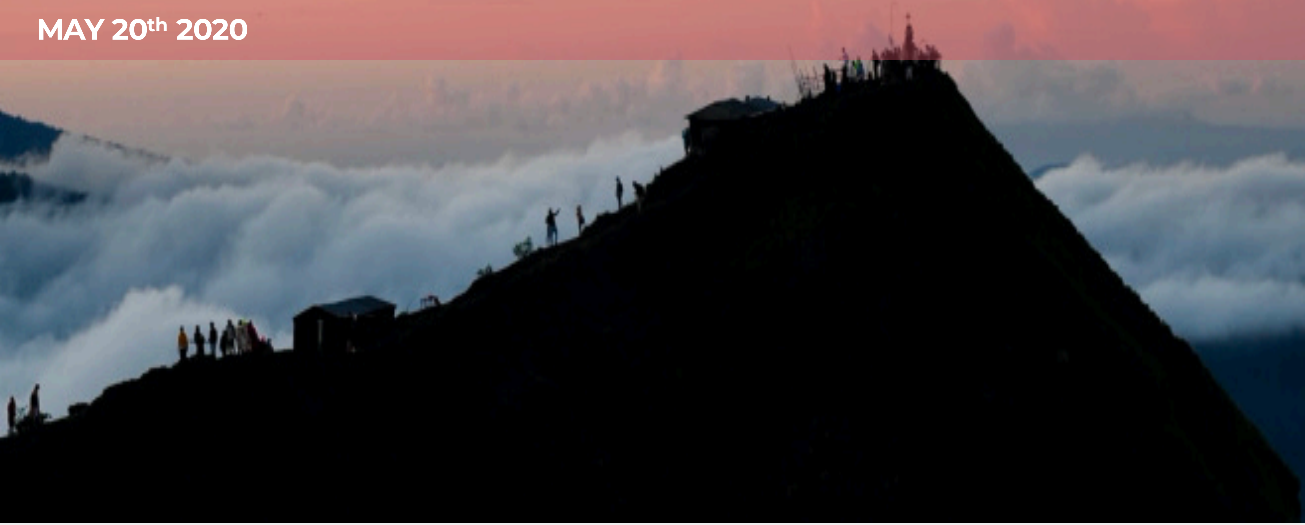
Always Innovating

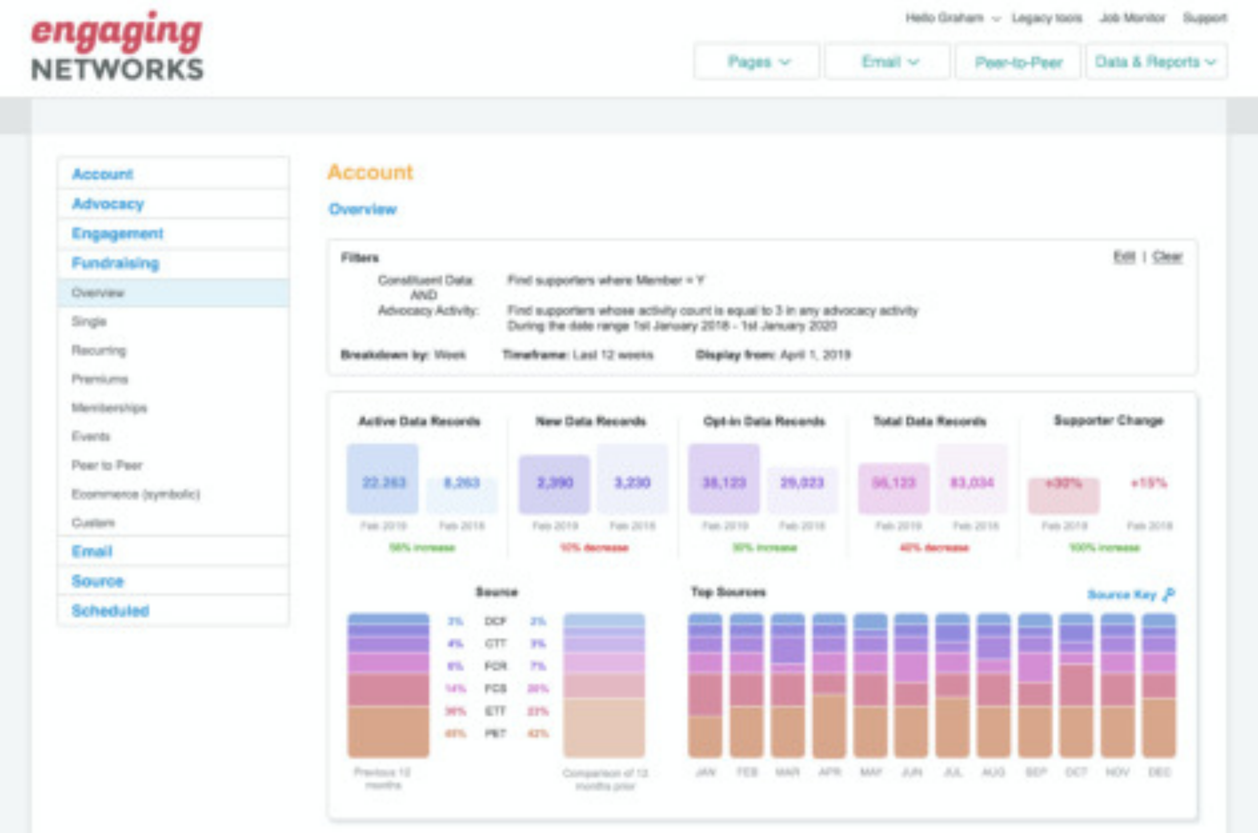
ENCC London

MAY 20th 2020



engaging NETWORKS

Reporting – dashboard 1



Hello Graham
Legacy tools
Job Monitor
Support
Pages
Email
Peer-to-Peer
Data & Reports
Account
Advocacy
Engagement
Fundraising
Overview
Single
Recurring
Premiums
Memberships
Events
Peer to Peer
Ecommerce (symbolic)
Custom
Email
Source
Scheduled

Account

Overview

Filters

Edit | Clear

Constituent Data: Find supporters where Member = Y

AND

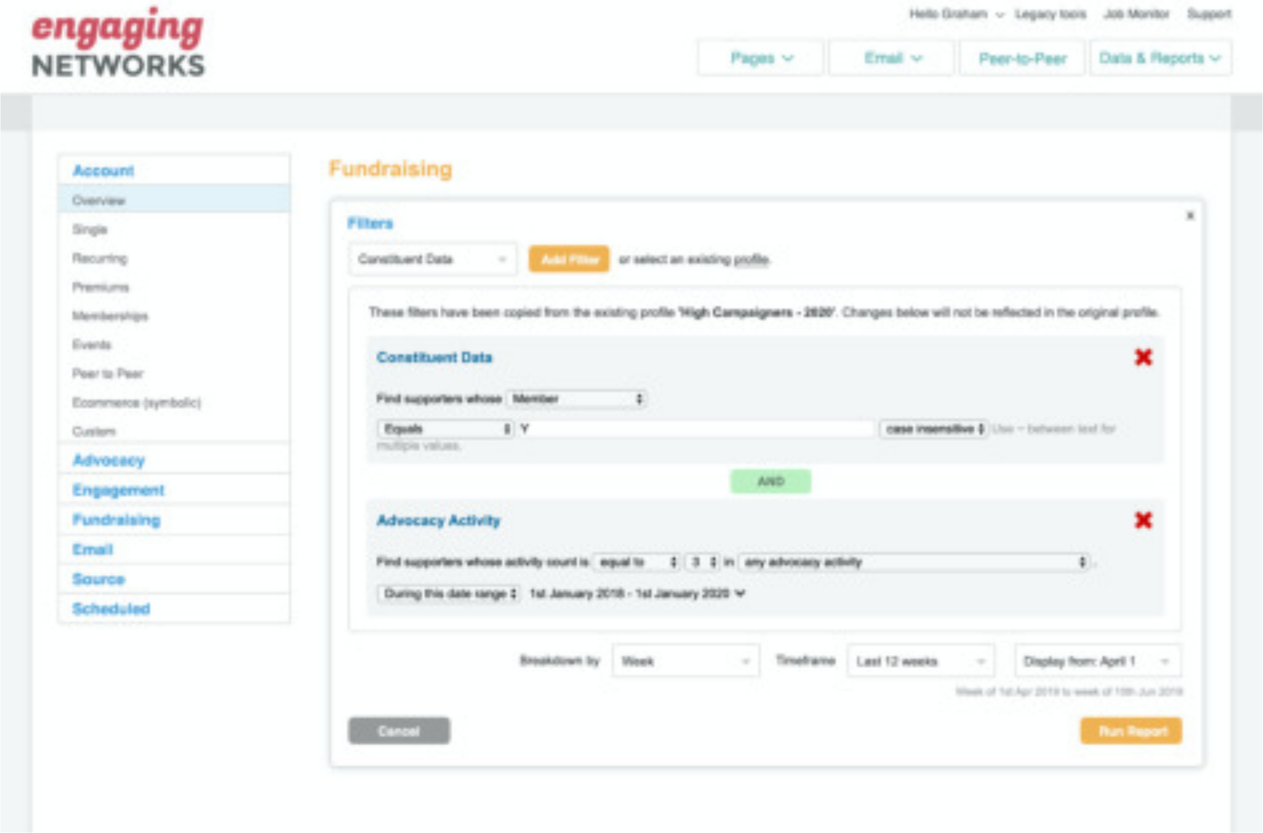
Advocacy Activity: Find supporters whose activity count is equal to 3 in any advocacy activity During the date range 1st January 2018 - 1st January 2020

Breakdown by: Week **Timeframe:** Last 12 weeks **Display from:** April 1, 2019

Active Data Records		New Data Records		Opt-in Data Records		Total Data Records		Supporter Change	
22,263	8,263	2,390	3,230	38,123	29,023	56,123	83,034	+30%	+15%
Feb 2019	Feb 2018	Feb 2019	Feb 2018	Feb 2019	Feb 2018	Feb 2019	Feb 2018	Feb 2019	Feb 2018
58% increase		10% decrease		30% increase		40% decrease		100% increase	

Source
3%
DCF
2%
4%
CTT
3%
6%
FOR
7%
14%
FCS
20%
30%
ETT
23%
43%
PET
42%
Previous 12 months
Comparison of 12 months prior
Top Sources
Source Key
JAN
FEB
MAR
APR
MAY
JUN
JUL
AUG
SEP
OCT
NOV
DEC

Reporting – dashboard 2


engaging NETWORKS
Hello Graham
Legacy tools
Job Monitor
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Pages
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Peer-to-Peer
Data & Reports
Account
Overview
Single
Recurring
Premiums
Memberships
Events
Peer to Peer
Ecommerce (symbolic)
Custom
Advocacy
Engagement
Fundraising
Email
Source
Scheduled
Add Filter
AND
Cancel
Run Report

Fundraising

Filters

Constituent Data ▾ or select an existing profile.

These filters have been copied from the existing profile '**High Campaigners - 2020**'. Changes below will not be reflected in the original profile.

Constituent Data

Find supporters whose Member

Equals Y case insensitive Use ~ between text for multiple values.

Advocacy Activity

Find supporters whose activity count is equal to 3 in any advocacy activity.

During this date range 1st January 2018 - 1st January 2020

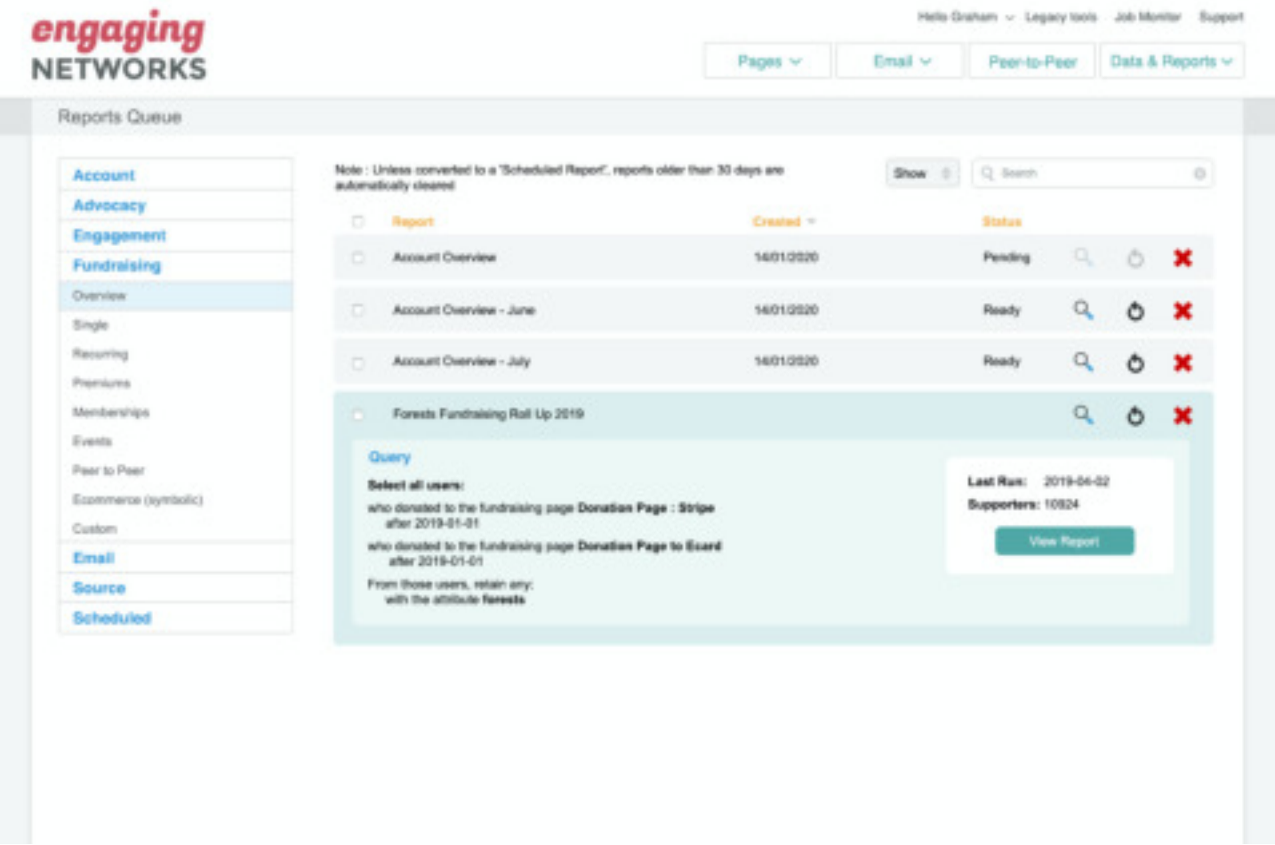
Breakdown by Week

Timeframe Last 12 weeks

Display from: April 1

Week of 1st Apr 2019 to week of 10th Jun 2019

Reporting – download


engaging NETWORKS
Hello Graham
Legacy tools
Job Monitor
Support
Pages
Email
Peer-to-Peer
Data & Reports
Reports Queue
Account
Advocacy
Engagement
Fundraising
Overview
Single
Recurring
Premiums
Memberships
Events
Peer to Peer
Ecommerce (symbolic)
Custom
Email
Source
Scheduled
Show
Search
View Report

Note : Unless converted to a 'Scheduled Report', reports older than 30 days are automatically cleared

☐	Report	Created	Status
☐	Account Overview	14/01/2020	Pending
☐	Account Overview - June	14/01/2020	Ready
☐	Account Overview - July	14/01/2020	Ready
☐	Forests Fundraising Roll Up 2019		

Query

Select all users:

who donated to the fundraising page **Donation Page : Stripe**
after 2019-01-01

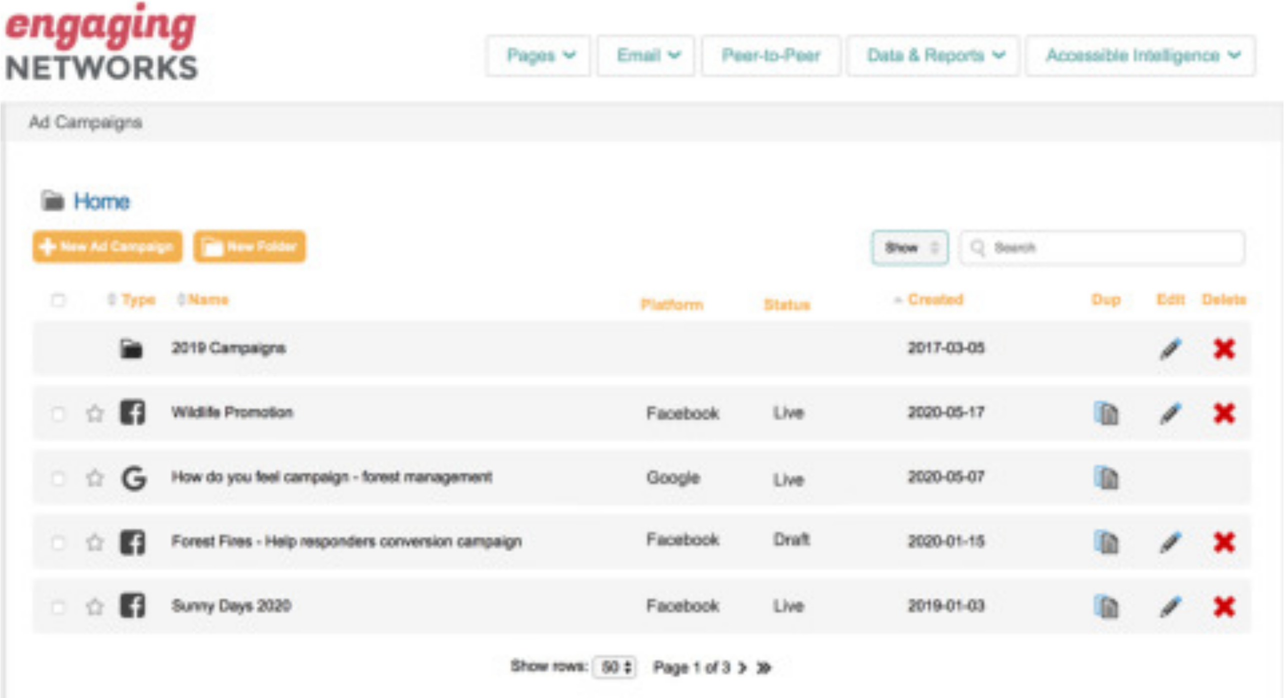
who donated to the fundraising page **Donation Page to Ecard**
after 2019-01-01

From those users, retain any:
with the attribute **forests**

Last Run: 2019-04-02

Supporters: 10924

Social Ad Builder - 1


engaging NETWORKS
Pages
Email
Peer-to-Peer
Data & Reports
Accessible Intelligence
New Ad Campaign
New Folder
Show
Search

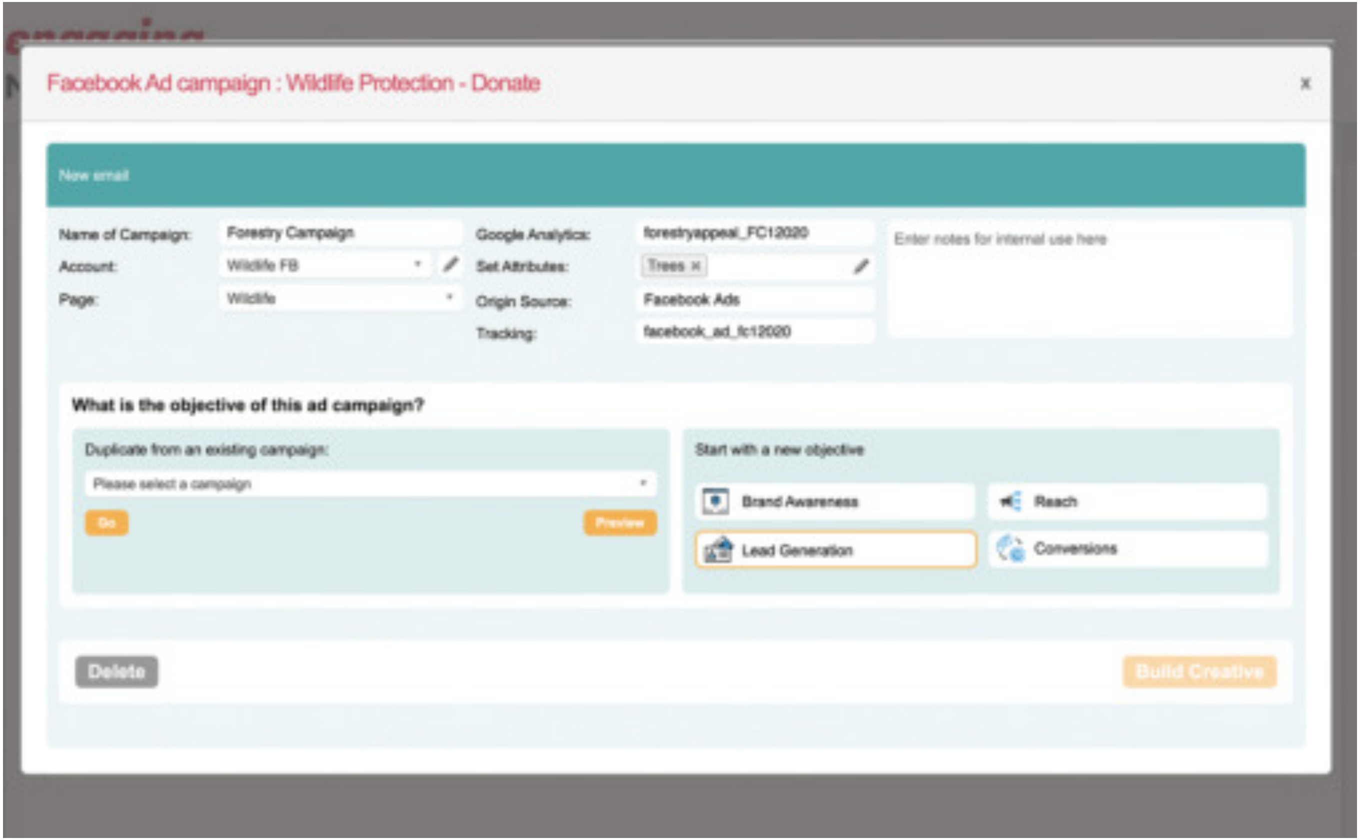
Ad Campaigns

Home

☐	Type	Name	Platform	Status	Created	Dup	Edit	Delete
	📁	2019 Campaigns			2017-03-05		✎	✖
☐ ☆	f	Wildlife Promotion	Facebook	Live	2020-05-17	⧉	✎	✖
☐ ☆	G	How do you feel campaign - forest management	Google	Live	2020-05-07	⧉		
☐ ☆	f	Forest Fires - Help responders conversion campaign	Facebook	Draft	2020-01-15	⧉	✎	✖
☐ ☆	f	Sunny Days 2020	Facebook	Live	2019-01-03	⧉	✎	✖

Show rows: 50 Page 1 of 3 › »

Social Ad Builder - 2



Facebook Ad campaign : Wildlife Protection - Donate

New email

Name of Campaign:	Forestry Campaign	Google Analytics:	forestryappeal_FC12020
Account:	Wildlife FB	Set Attributes:	Trees
Page:	Wildlife	Origin Source:	Facebook Ads
		Tracking:	facebook_ad_fc12020

Enter notes for internal use here

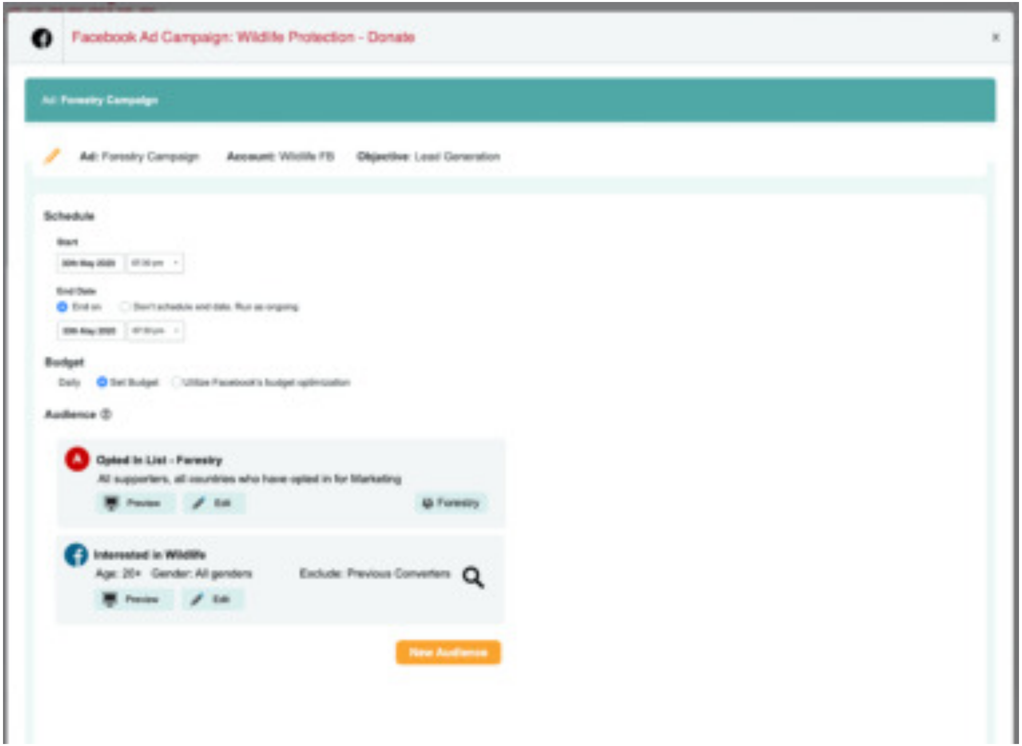
What is the objective of this ad campaign?

Duplicate from an existing campaign:

Please select a campaign

×
Go
Preview
Start with a new objective
Brand Awareness
Reach
Lead Generation
Conversions
Delete
Build Creative

Social Ad Builder - 3



Facebook Ad Campaign: Wildlife Protection - Donate

Ad: Forestry Campaign

Ad: Forestry Campaign **Account:** Wildlife FB **Objective:** Lead Generation

Schedule

Start

End Date

● End on ○ Don't schedule end date. Run as ongoing

Budget

Daily ● Set Budget ○ Utilize Facebook's budget optimization

Audience

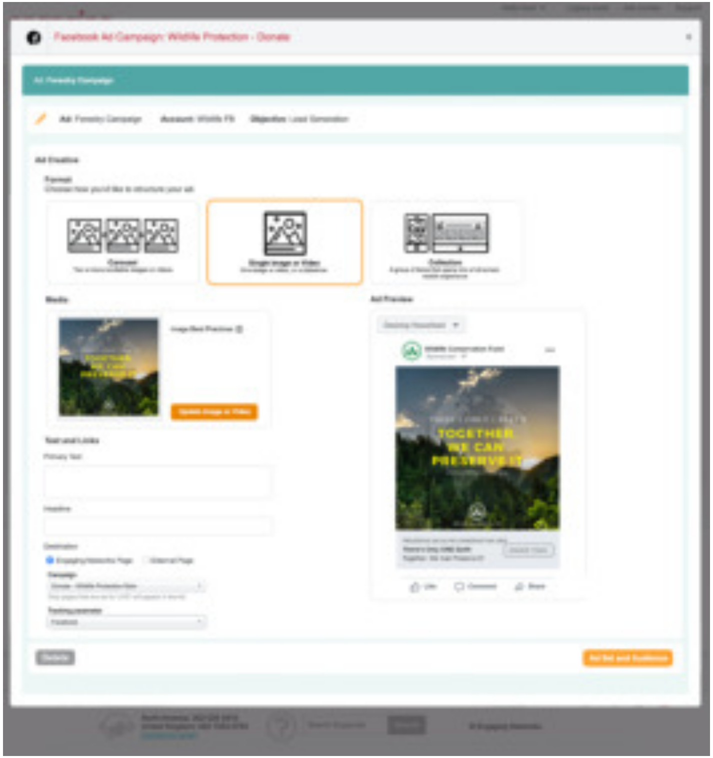
Opted In List - Forestry

All supporters, all countries who have opted in for Marketing

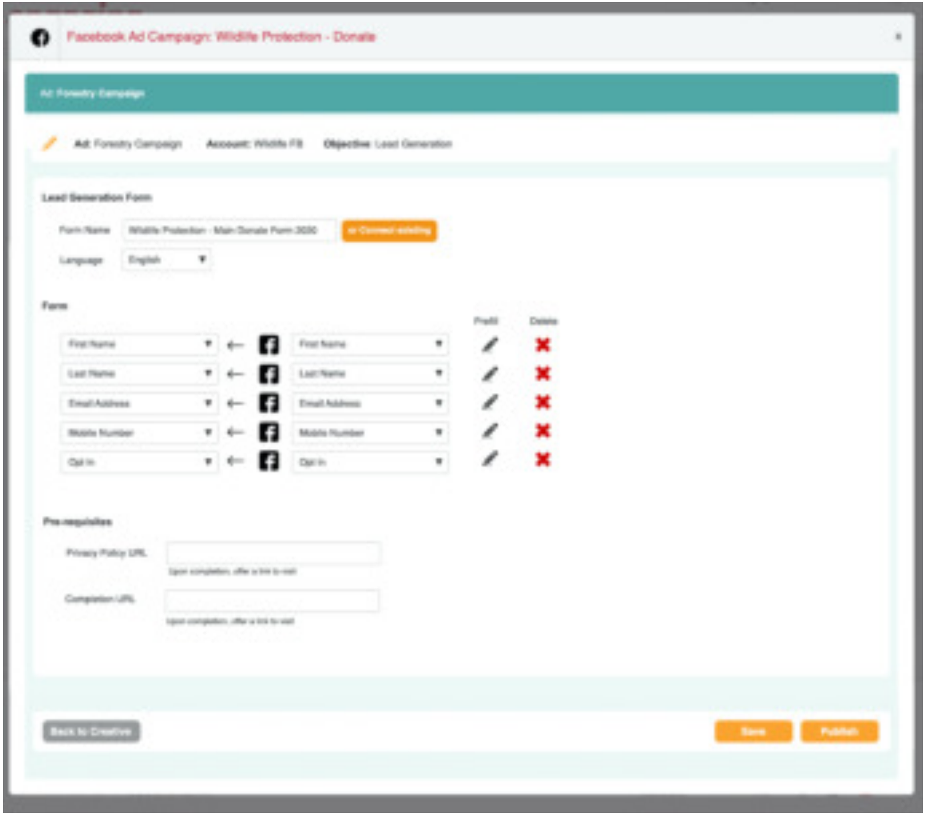
Interested in Wildlife

Age: 20+ Gender: All genders Exclude: Previous Converters

Social Ad Builder - 4


Facebook Ad Campaign: Wildlife Protection - Donate
TOGETHER
WE CAN
PRESERVE IT

Social Ad Builder - 5



Facebook Ad Campaign: Wildlife Protection - Donate

Ad: Forestry Campaign

Ad: Forestry Campaign **Account:** Wildlife FB **Objective:** Lead Generation

Lead Generation Form

Form Name: Wildlife Protection - Main Donate Form 2020

Language: English

Form

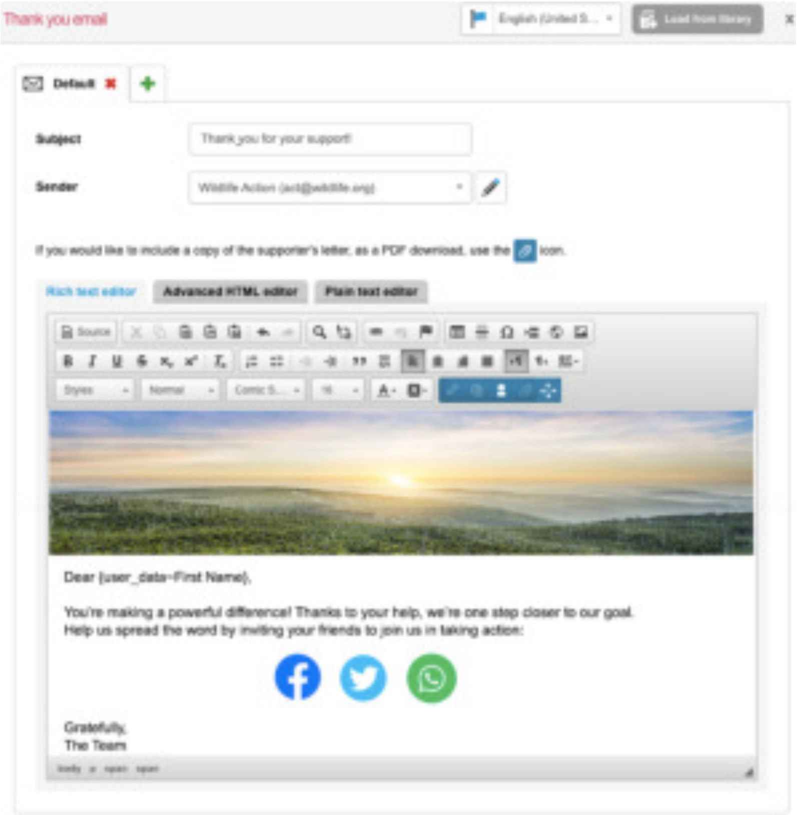
			Prefill	Delete
First Name ▾	←	First Name ▾	✎	✖
Last Name ▾	←	Last Name ▾	✎	✖
Email Address ▾	←	Email Address ▾	✎	✖
Mobile Number ▾	←	Mobile Number ▾	✎	✖
Opt In ▾	←	Opt In ▾	✎	✖

Pre-requisites

Privacy Policy URL:
Upon completion, offer a link to visit

Completion URL:
Upon completion, offer a link to visit

Social Sharing Enhancements 1


Thank you email
English (United S...
Load from library
Default
Rich text editor
Advanced HTML editor
Plain text editor

Subject Thank you for your support!

Sender Wildlife Action (act@wildlife.org)

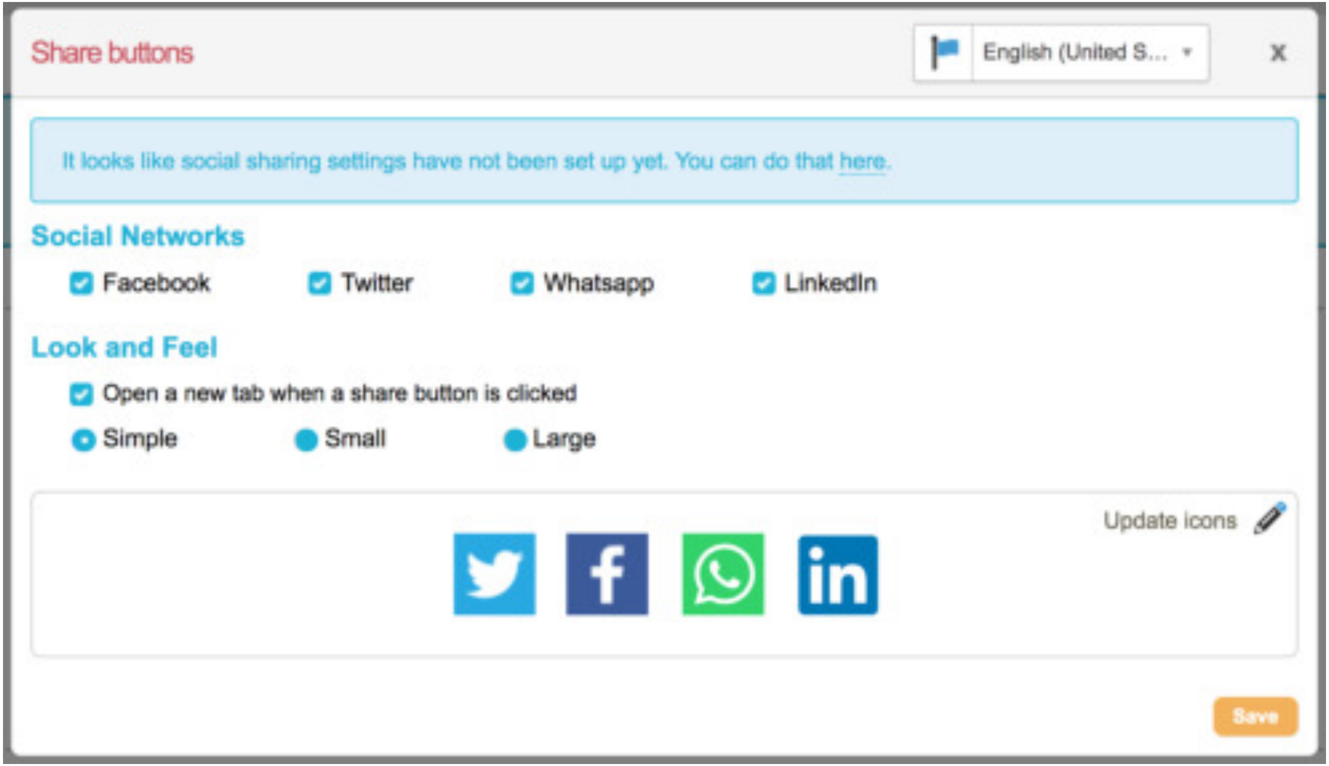
If you would like to include a copy of the supporter's letter, as a PDF download, use the 🔗 icon.

Dear {user_data~First Name},

You're making a powerful difference! Thanks to your help, we're one step closer to our goal.
Help us spread the word by inviting your friends to join us in taking action:

Gratefully,
The Team

Social Sharing Enhancements 2



Share buttons

English (United S...

It looks like social sharing settings have not been set up yet. You can do that here.

Social Networks

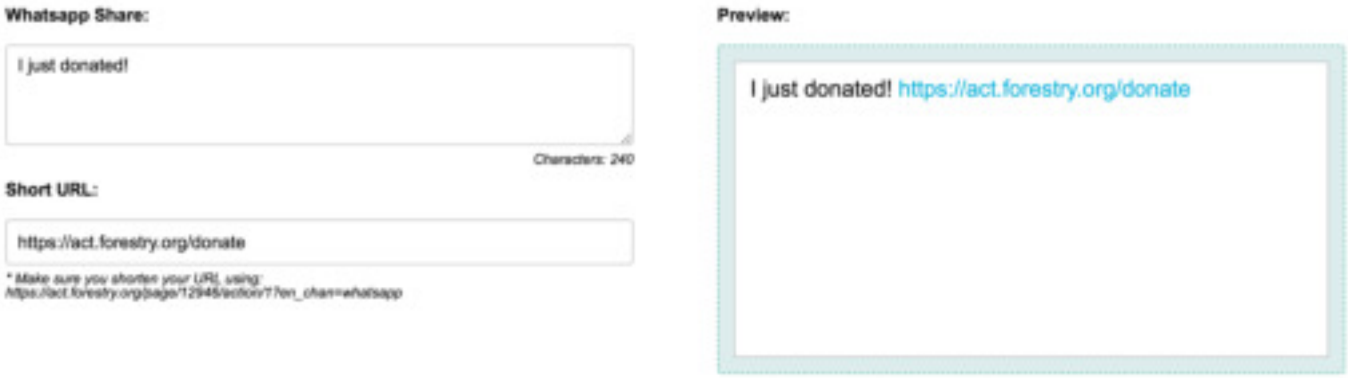
☑ Facebook ☑ Twitter ☑ Whatsapp ☑ LinkedIn

Look and Feel

☑ Open a new tab when a share button is clicked

○ Simple ● Small ● Large

Social Sharing Enhancements 3



Whatsapp Share:

I just donated!

Characters: 240

Short URL:

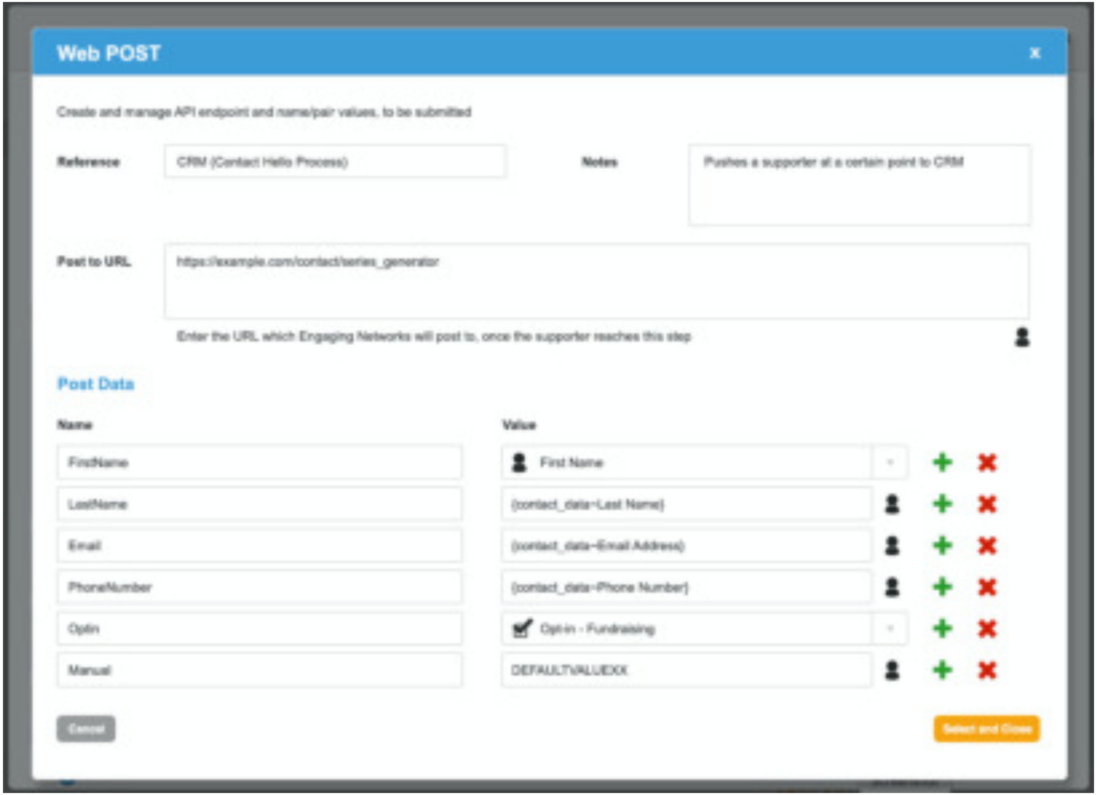
https://act.forestry.org/donate

** Make sure you shorten your URL using:*
https://act.forestry.org/page/12948/action/1?en_chan=whatsapp

Preview:

I just donated! https://act.forestry.org/donate

Marketing automation 1



Create and manage API endpoint and name/pair values, to be submitted

Reference CRM (Contact Hello Process)

Notes Pushes a supporter at a certain point to CRM

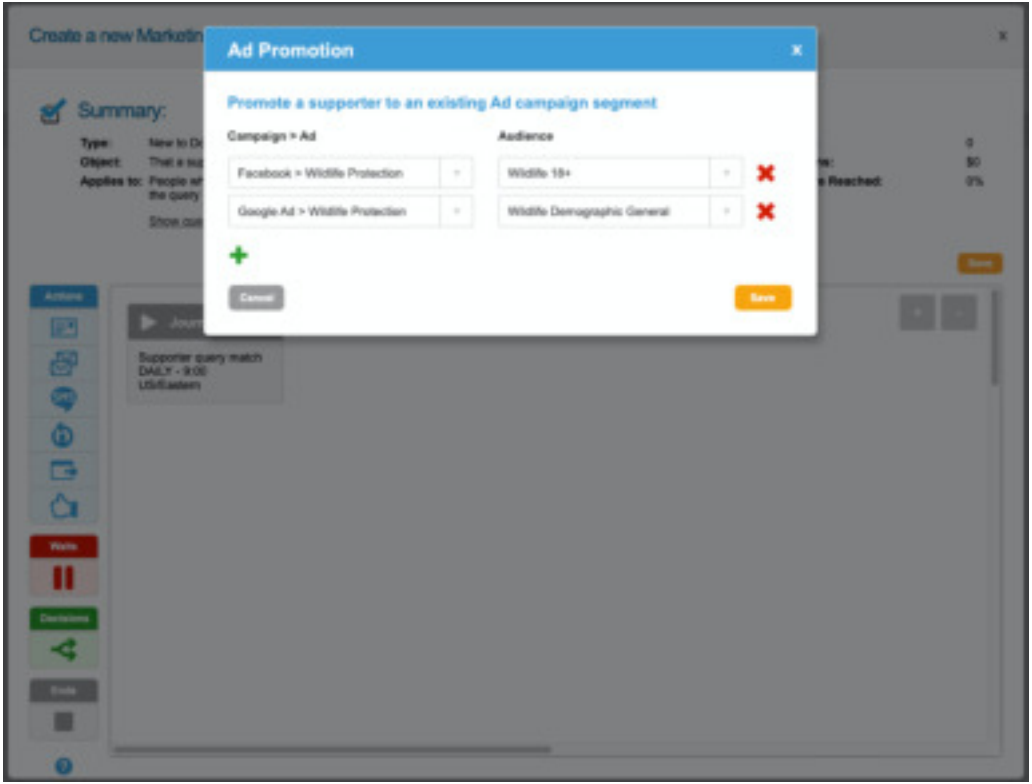
Post to URL https://example.com/contact/series_generator

Enter the URL which Engaging Networks will post to, once the supporter reaches this step

Post Data

Name	Value
FirstName	First Name
LastName	{contact_data~Last Name}
Email	{contact_data~Email Address}
PhoneNumber	{contact_data~Phone Number}
OptIn	☑ Opt-in - Fundraising
Manual	DEFAULTVALUEXX

Marketing automation 2



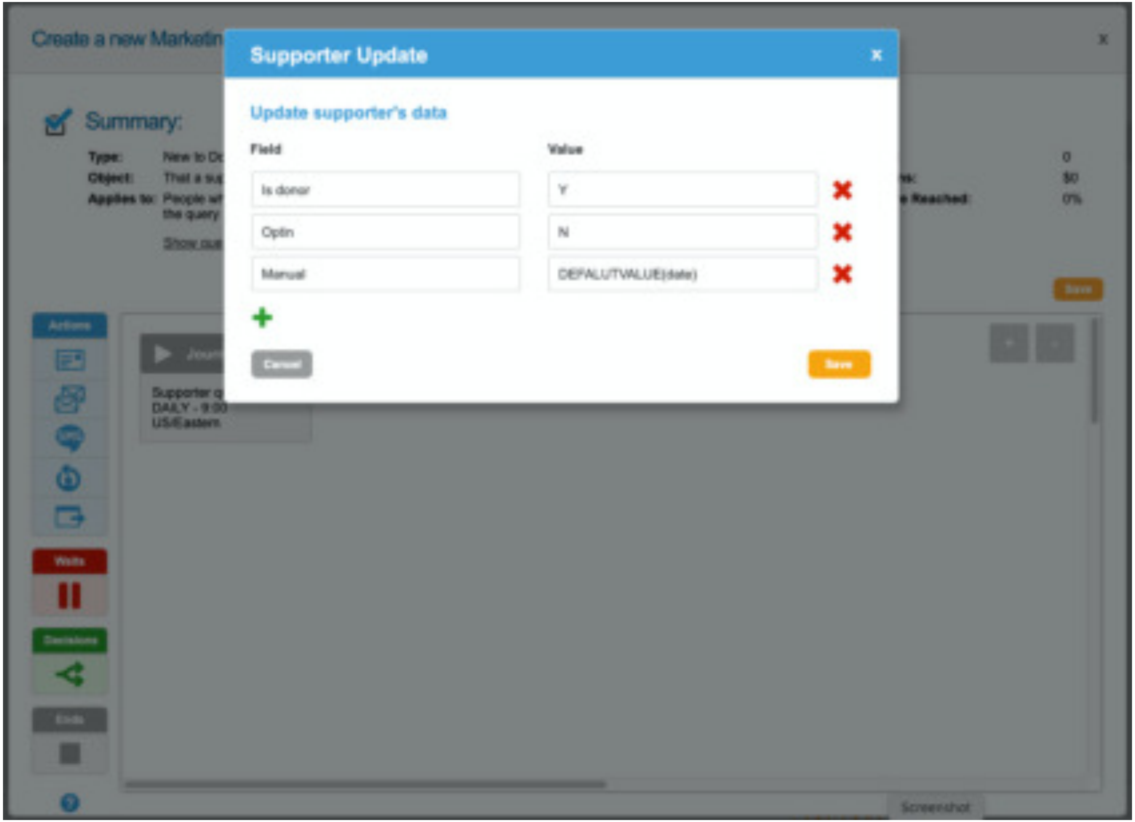
Ad Promotion

Promote a supporter to an existing Ad campaign segment

Campaign > Ad	Audience
Facebook > Wildlife Protection	Wildlife 18+
Google Ad > Wildlife Protection	Wildlife Demographic General

Cancel
Save
Summary:
Type:
Object:
Applies to:
Actions
Waits
Decisions
Ends
Supporter query match
DAILY - 9:00
US/Eastern

Marketing automation 3

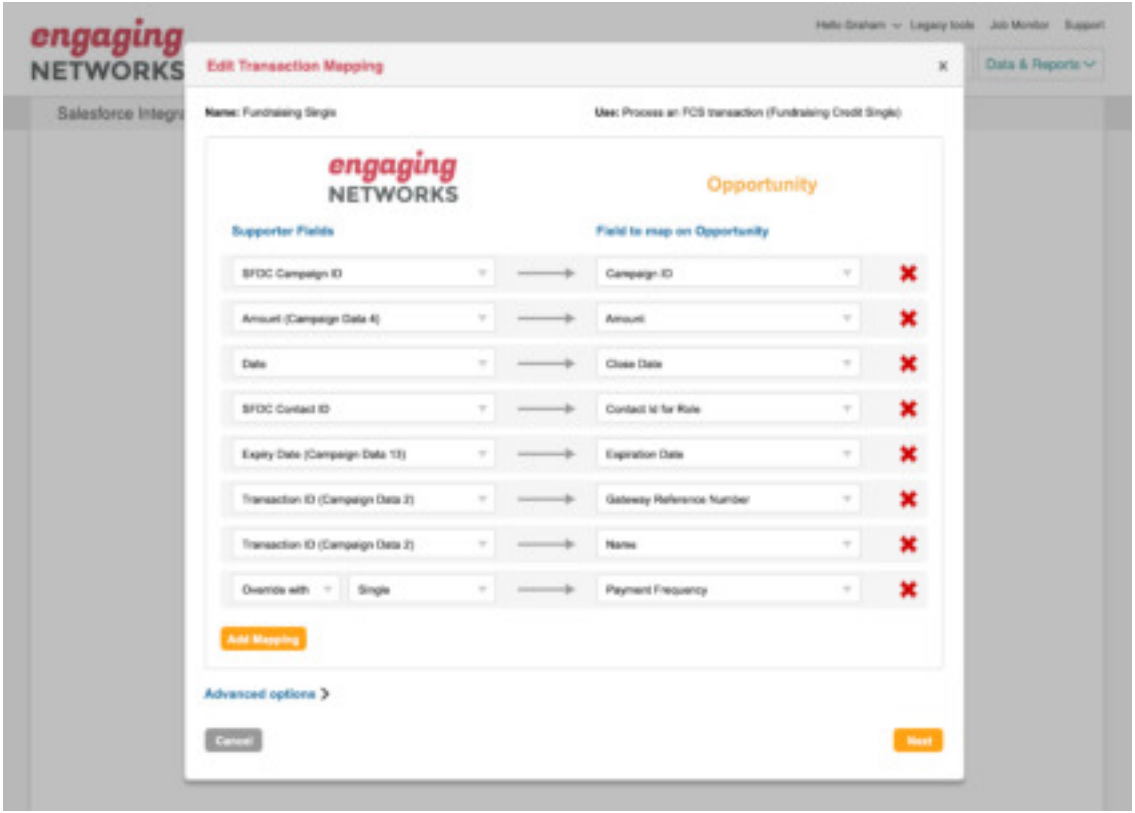


Supporter Update

Update supporter's data

Field	Value
Is donor	Y
Optin	N
Manual	DEFAULTVALUE(date)

Salesforce 1


Hello Graham
Legacy tools
Job Monitor
Support
Data & Reports
Salesforce Integr
×
engaging NETWORKS
Opportunity
Add Mapping
Advanced options
Cancel
Next

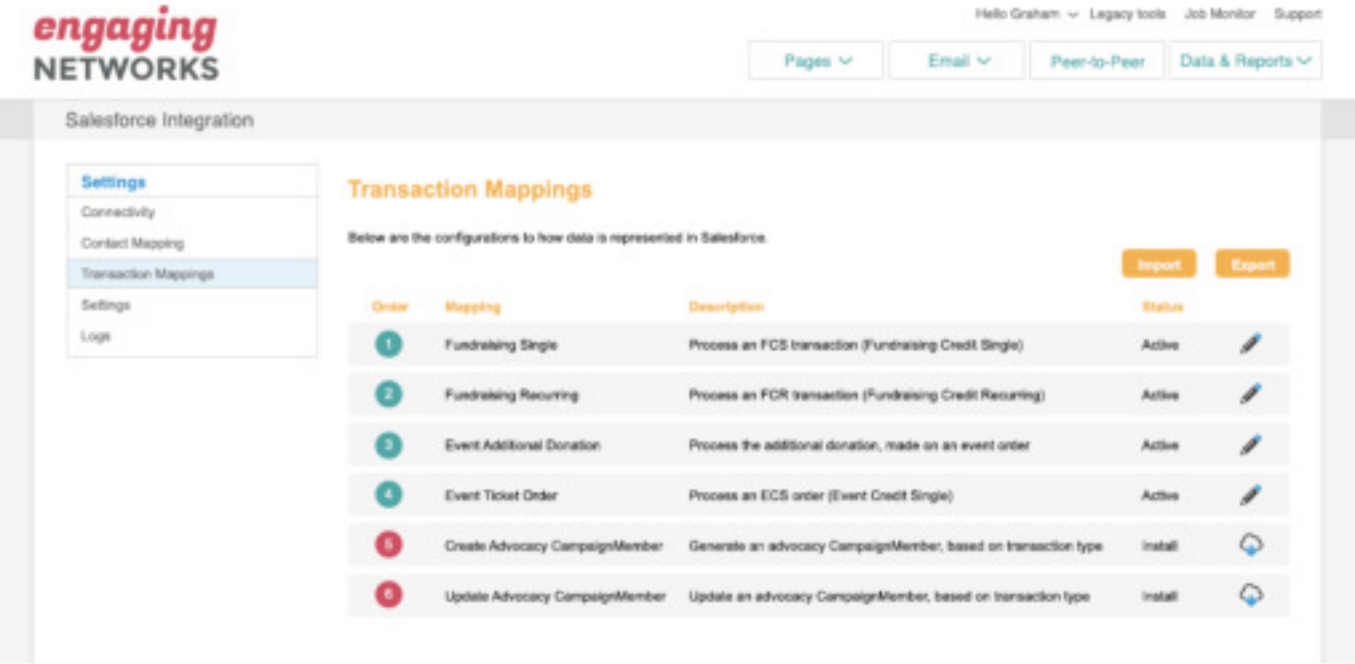
Edit Transaction Mapping

Name: Fundraising Single

Use: Process an FCS transaction (Fundraising Credit Single)

Supporter Fields		Field to map on Opportunity
SFDC Campaign ID	→	Campaign ID
Amount (Campaign Data 4)	→	Amount
Date	→	Close Date
SFDC Contact ID	→	Contact Id for Role
Expiry Date (Campaign Data 13)	→	Expiration Date
Transaction ID (Campaign Data 2)	→	Gateway Reference Number
Transaction ID (Campaign Data 2)	→	Name
Override with · Single	→	Payment Frequency

Salesforce 2

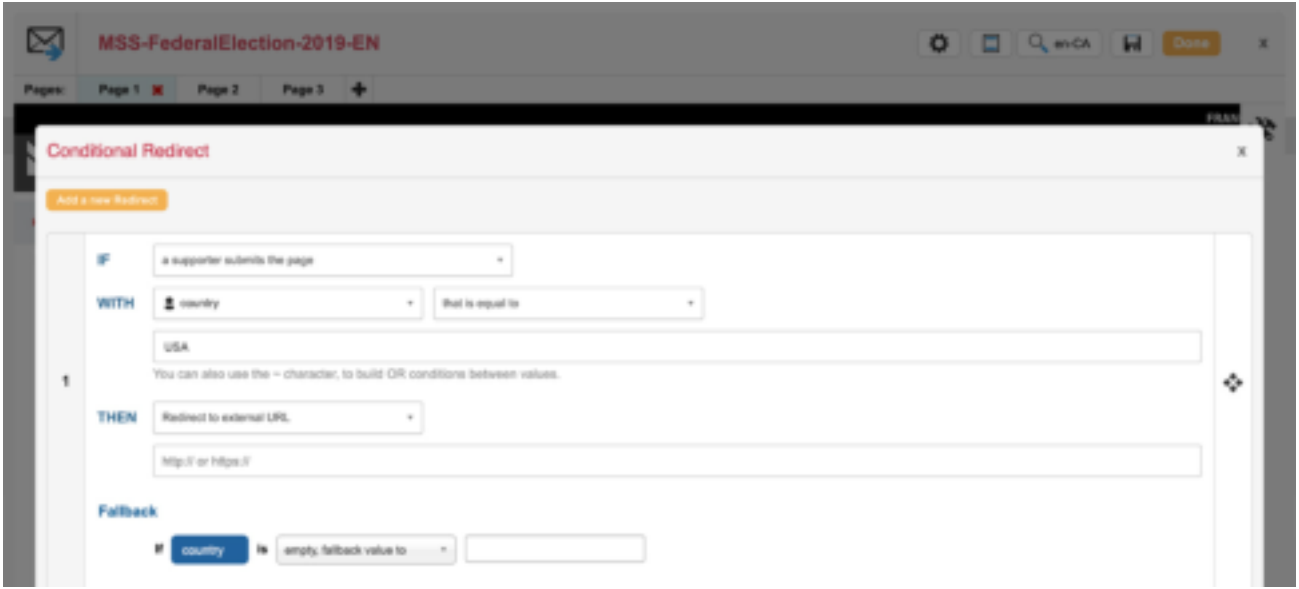

engaging NETWORKS
Hello Graham
Legacy tools
Job Monitor
Support
Pages
Email
Peer-to-Peer
Data & Reports
Salesforce Integration
Settings
Connectivity
Contact Mapping
Transaction Mappings
Settings
Logs
Import
Export

Transaction Mappings

Below are the configurations to how data is represented in Salesforce.

Order	Mapping	Description	Status	
1	Fundraising Single	Process an FCS transaction (Fundraising Credit Single)	Active	✎
2	Fundraising Recurring	Process an FCR transaction (Fundraising Credit Recurring)	Active	✎
3	Event Additional Donation	Process the additional donation, made on an event order	Active	✎
4	Event Ticket Order	Process an ECS order (Event Credit Single)	Active	✎
5	Create Advocacy CampaignMember	Generate an advocacy CampaignMember, based on transaction type	Install	⤓
6	Update Advocacy CampaignMember	Update an advocacy CampaignMember, based on transaction type	Install	⤓

Page-Builder smart re-direct


MSS-FederalElection-2019-EN
en-CA
Done
Pages:
Page 1
Page 2
Page 3
Conditional Redirect
Add a new Redirect

1

IF a supporter submits the page

WITH country that is equal to

USA

You can also use the ~ character, to build OR conditions between values.

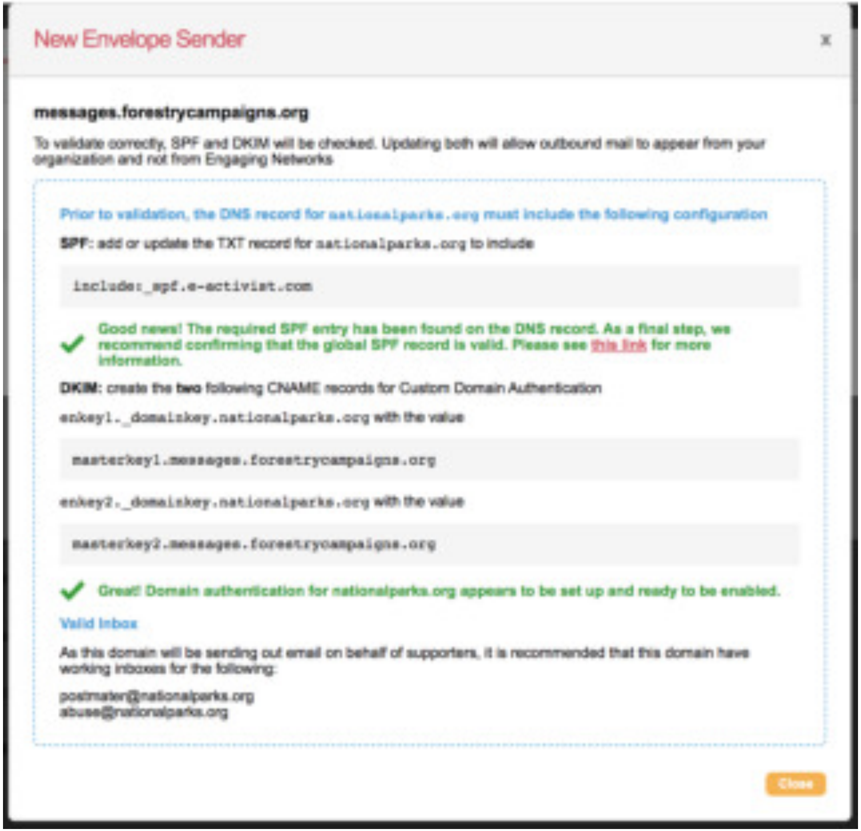
THEN Redirect to external URL

http:// or https://

Fallback

If country is empty, fallback value to

Email advocacy – sender enveloppe



messages.forestrycampaigns.org

To validate correctly, SPF and DKIM will be checked. Updating both will allow outbound mail to appear from your organization and not from Engaging Networks

Prior to validation, the DNS record for `nationalparks.org` must include the following configuration

SPF: add or update the TXT record for `nationalparks.org` to include

```
include:_spf.e-activist.com
```

✓ Good news! The required SPF entry has been found on the DNS record. As a final step, we recommend confirming that the global SPF record is valid. Please see this link for more information.

DKIM: create the **two** following CNAME records for Custom Domain Authentication

`enkey1._domainkey.nationalparks.org` with the value

```
masterkey1.messages.forestrycampaigns.org
```

`enkey2._domainkey.nationalparks.org` with the value

```
masterkey2.messages.forestrycampaigns.org
```

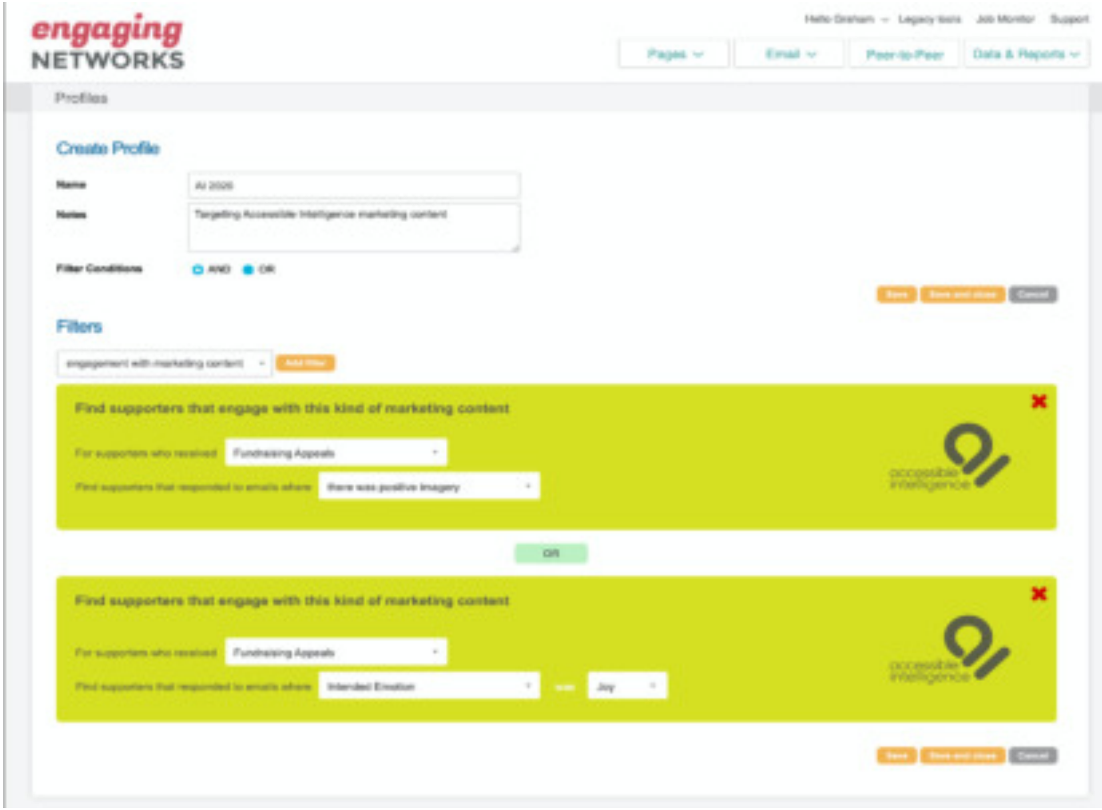
✓ Great! Domain authentication for nationalparks.org appears to be set up and ready to be enabled.

Valid Inbox

As this domain will be sending out email on behalf of supporters, it is recommended that this domain have working inboxes for the following:

postmaster@nationalparks.org
abuse@nationalparks.org

Machine Learning (AI)


engaging NETWORKS
Hello Graham
Legacy tools
Job Monitor
Support
Pages
Email
Peer-to-Peer
Data & Reports
Profiles
Save
Save and close
Cancel
Add filter
accessible intelligence
OR
Save
Save and close
Cancel

Create Profile

Name AI 2020

Notes Targeting Accessible Intelligence marketing content

Filter Conditions ○ AND ● OR

Filters

engagement with marketing content

Find supporters that engage with this kind of marketing content

For supporters who received: Fundraising Appeals

Find supporters that responded to emails where: there was positive imagery

OR

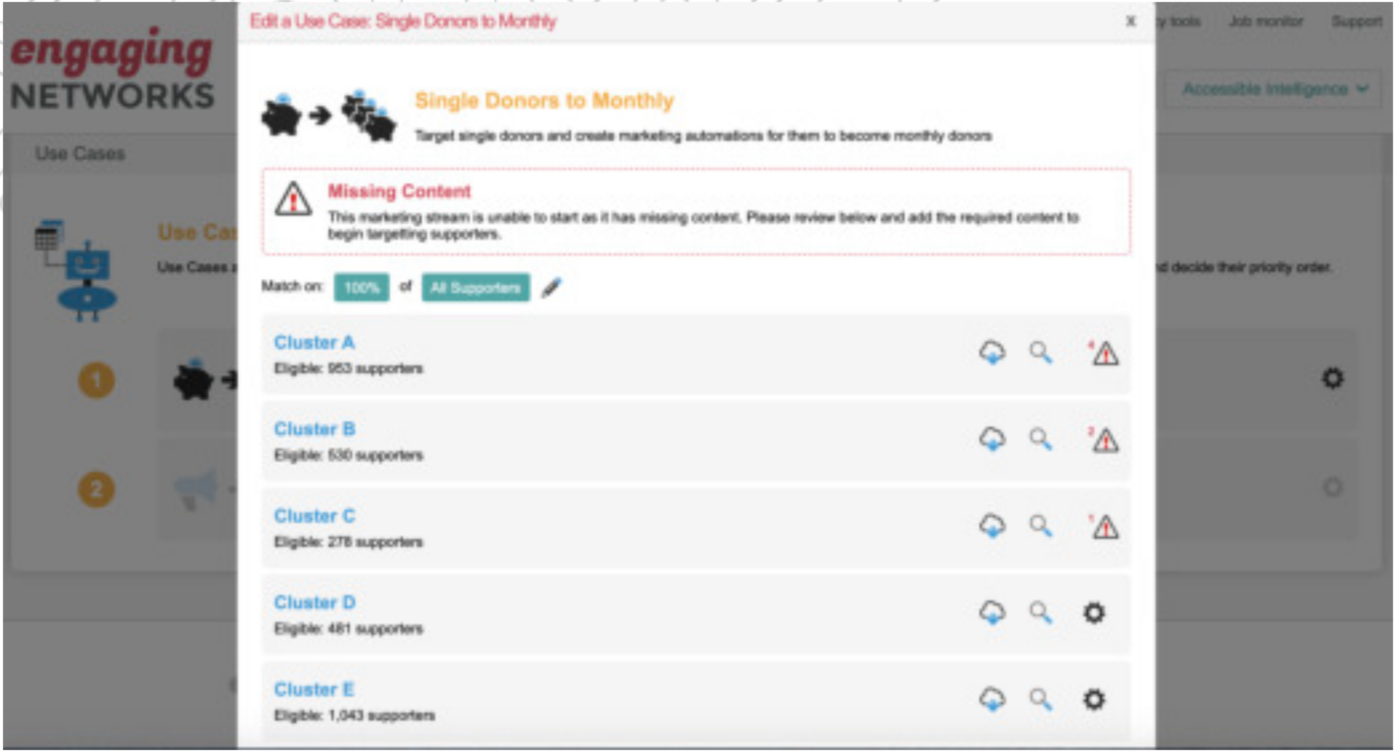
Find supporters that engage with this kind of marketing content

For supporters who received: Fundraising Appeals

Find supporters that responded to emails where: Intended Emotion was Joy

accessible
intelligence

engaging
NETWORKS


engaging NETWORKS
Use Cases
y tools
Job monitor
Support
Accessible Intelligence
Use Ca
Use Cases
d decide their priority order.
1
2

Edit a Use Case: Single Donors to Monthly

Single Donors to Monthly

Target single donors and create marketing automations for them to become monthly donors

Missing Content

This marketing stream is unable to start as it has missing content. Please review below and add the required content to begin targeting supporters.

Match on: 100% of All Supporters

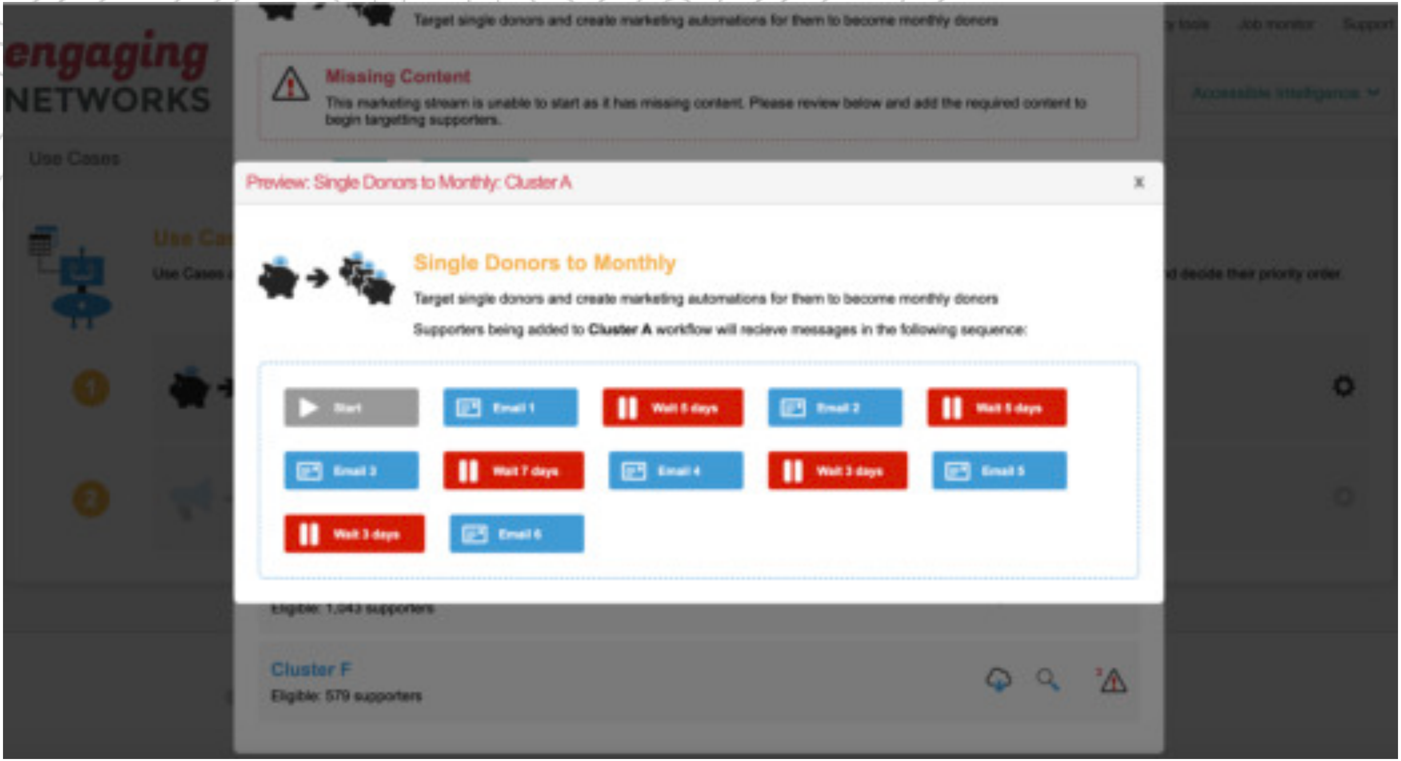
Cluster A
Eligible: 953 supporters

Cluster B
Eligible: 530 supporters

Cluster C
Eligible: 278 supporters

Cluster D
Eligible: 481 supporters

Cluster E
Eligible: 1,043 supporters



engaging
NETWORKS
Use Cases
Job monitor
Support
Accessible Intelligence
Start
Email 1
Wait 5 days
Email 2
Wait 5 days
Email 3
Wait 7 days
Email 4
Wait 3 days
Email 5
Wait 3 days
Email 6

Target single donors and create marketing automations for them to become monthly donors

Missing Content

This marketing stream is unable to start as it has missing content. Please review below and add the required content to begin targetting supporters.

Preview: Single Donors to Monthly: Cluster A

Single Donors to Monthly

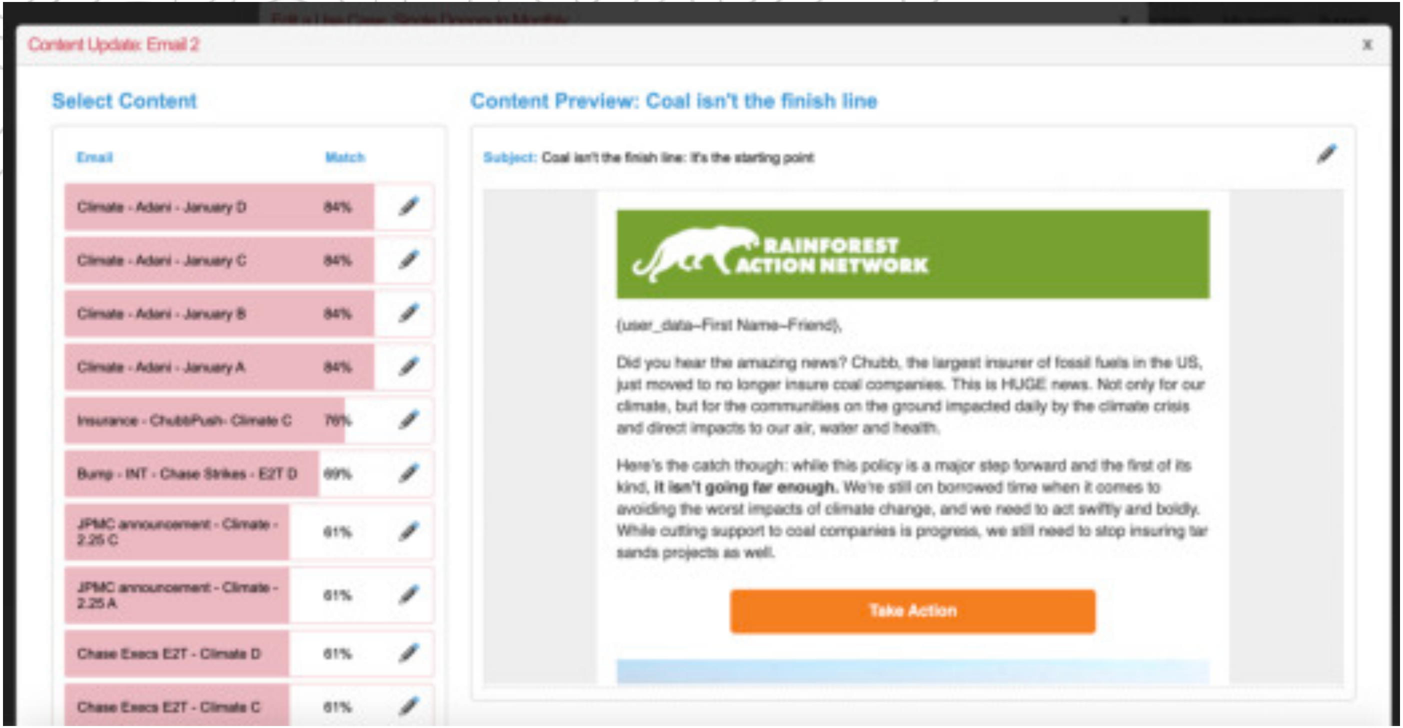
Target single donors and create marketing automations for them to become monthly donors

Supporters being added to **Cluster A** workflow will recieve messages in the following sequence:

Eligible: 1,043 supporters

Cluster F

Eligible: 579 supporters



Content Update: Email 2

Select Content

Email	Match
Climate - Adani - January D	84%
Climate - Adani - January C	84%
Climate - Adani - January B	84%
Climate - Adani - January A	84%
Insurance - ChubbPush - Climate C	76%
Bump - INT - Chase Strikes - E2T D	69%
JPMC announcement - Climate - 2.25 C	61%
JPMC announcement - Climate - 2.25 A	61%
Chase Execs E2T - Climate D	61%
Chase Execs E2T - Climate C	61%

Content Preview: Coal isn't the finish line

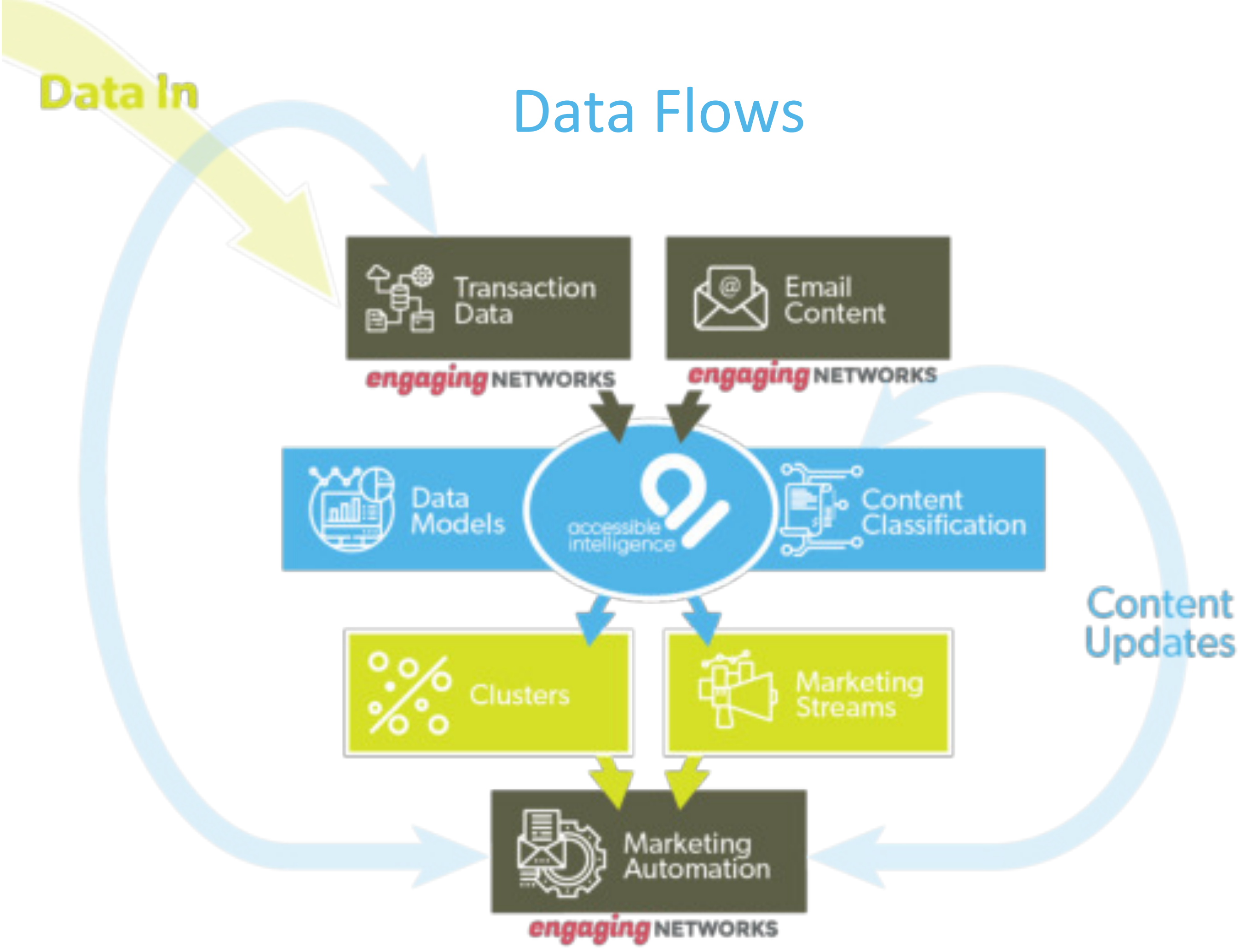
Subject: Coal isn't the finish line: it's the starting point

{user_data~First Name~Friend},

Did you hear the amazing news? Chubb, the largest insurer of fossil fuels in the US, just moved to no longer insure coal companies. This is HUGE news. Not only for our climate, but for the communities on the ground impacted daily by the climate crisis and direct impacts to our air, water and health.

Here's the catch though: while this policy is a major step forward and the first of its kind, **it isn't going far enough.** We're still on borrowed time when it comes to avoiding the worst impacts of climate change, and we need to act swiftly and boldly. While cutting support to coal companies is progress, we still need to stop insuring tar sands projects as well.

Data Flows



Data In

Transaction Data

Email Content

engaging NETWORKS

engaging NETWORKS

Data Models

accessible intelligence

Content Classification

Clusters

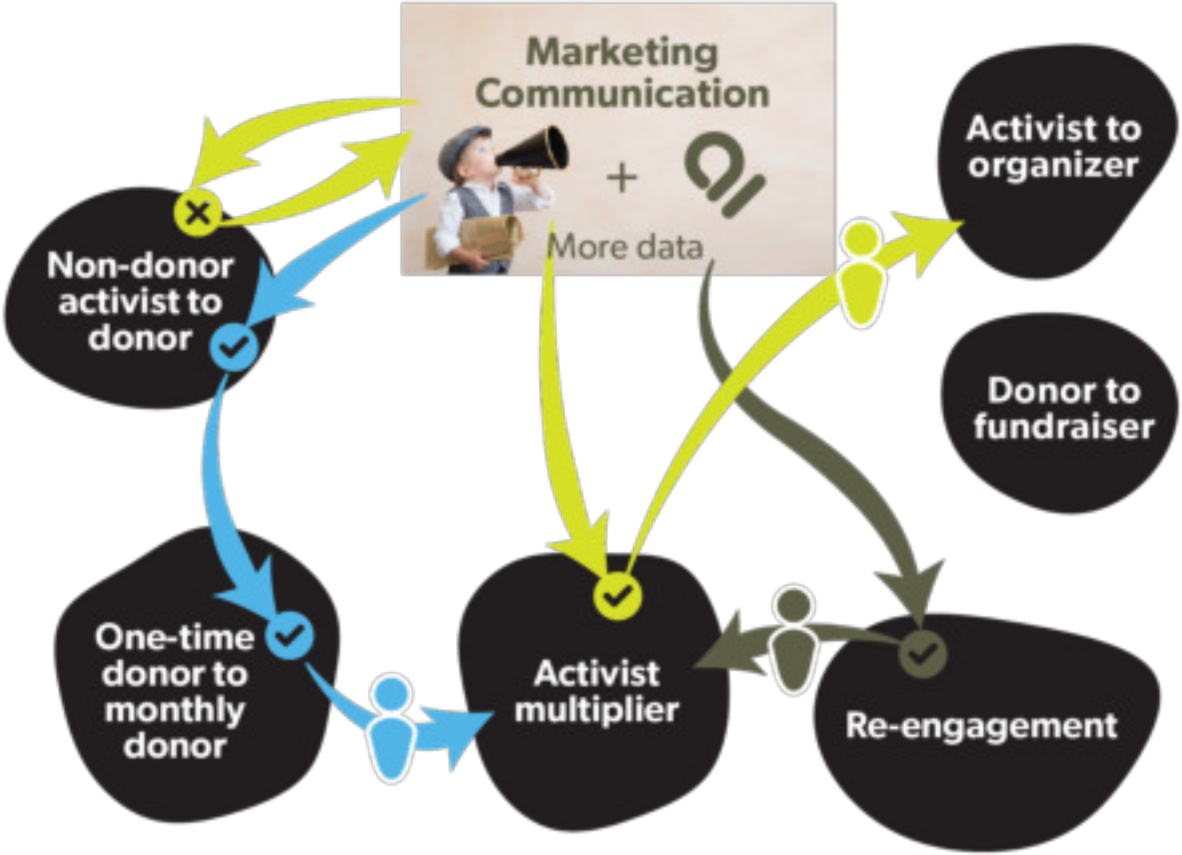
Marketing Streams

Content Updates

Marketing Automation

engaging NETWORKS

Ecosystem 2021



Marketing Communication

+

More data

Non-donor activist to donor

Activist to organizer

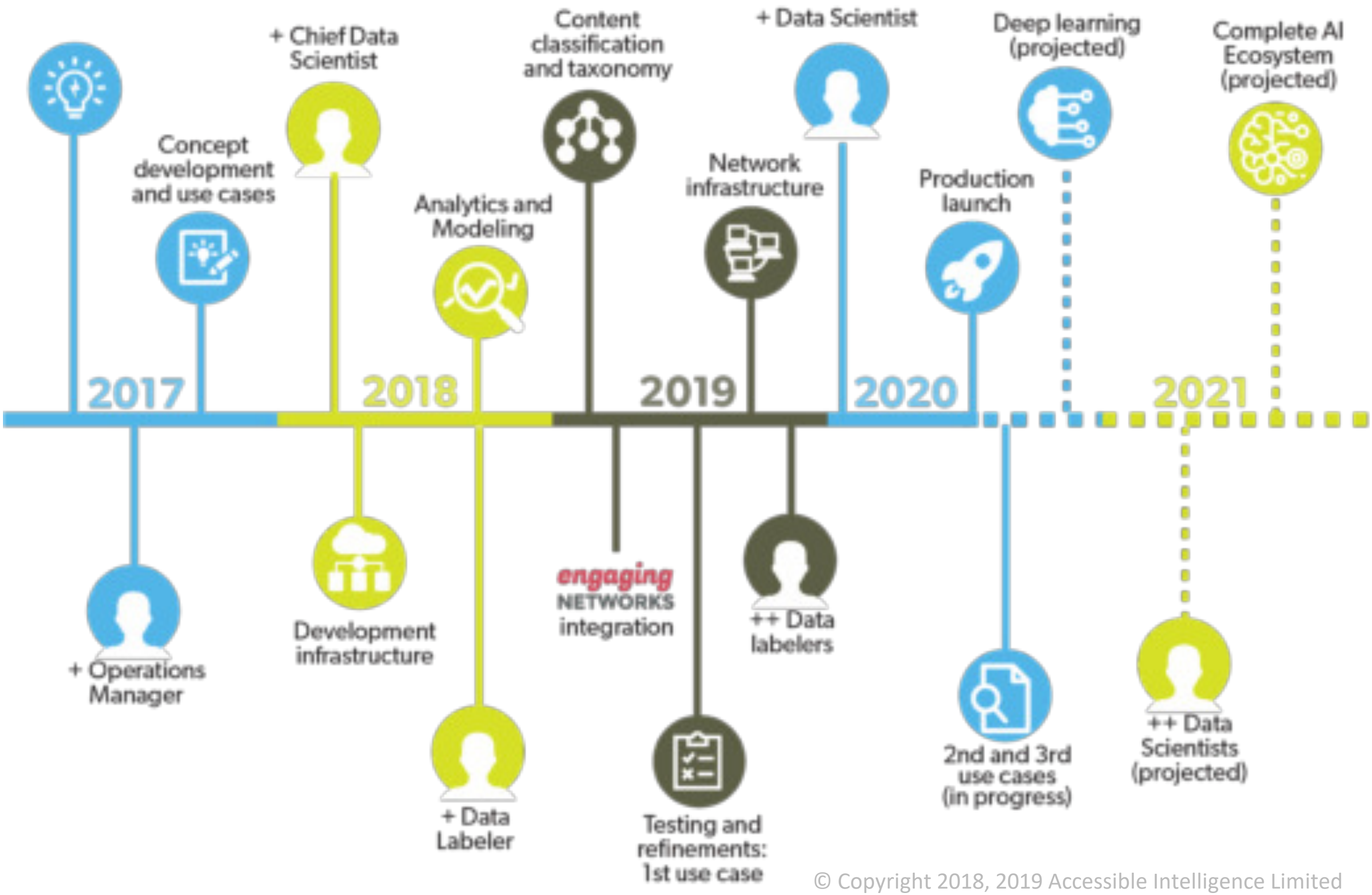
Donor to fundraiser

One-time donor to monthly donor

Activist multiplier

Re-engagement

Milestones



2017

Concept development and use cases

+ Operations Manager

+ Chief Data Scientist

2018

Development infrastructure

Analytics and Modeling

+ Data Labeler

Content classification and taxonomy

2019

engaging NETWORKS integration

Testing and refinements: 1st use case

Network infrastructure

++ Data labelers

+ Data Scientist

2020

Production launch

2nd and 3rd use cases (in progress)

Deep learning (projected)

2021

++ Data Scientists (projected)

Complete AI Ecosystem (projected)

MERCI
tout le monde