

# Continuing the Conversation

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5-25-22

Client Roundtable



# What we'll cover

1. Response notifications (internal and external alerts)
2. Segmented marketing automation (write-back to other systems)
3. Nurture campaigns
4. Building lists
5. Conversational Inbox



# Response notifications: Internal and external alerts

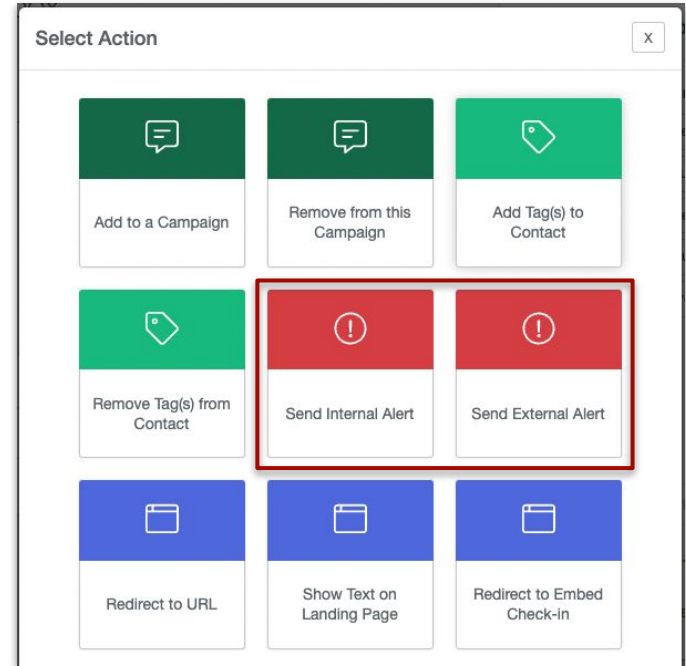
Sends an alert email to someone which includes the question asked, response selected (or typed), name, and email of the person who responded. Personalization Tokens can be added to include organization, company, phone number, or other fields mapped from your AMS.

Internal Alerts use cases:

- When someone answers an open-ended question
- When someone gives a low satisfaction rating
- When someone says “Yes, register me” or that they need assistance

External Alerts use cases:

- Alert board members to reach out to dissatisfied members
- Alert volunteer chapter leaders
- Alert membership committee



# Segmented marketing automation (write-back to other systems)

Sending data to your AMS or adding a contact to a campaign in your marketing automation system based on what they tell you in PropFuel.

Use cases:

- Add conference prospects to different marketing automation campaigns if they plan to attend in-person versus virtually.
- Write member interests to your AMS or marketing automation system so you can have more targeted conversations later.



As you may have heard, TESOL is hosting its first-ever hybrid International Convention & English Language Expo, 22-25 March 2022 online and in-person, in Pittsburgh, PA, USA!

It's one event, but you have two experiences to choose from: attend in person or virtually. If you're interested, we want to make sure you stay up-to-date. Please let us know if you'll be there, and we will get you the information you need.

Are you planning on attending TESOL 2022?

Yes, I'll be participating in person.

Yes, I'll be participating virtually.

I'm not sure yet.

No, I can't make it this year.

Click to Name Workflow

If Question Answered matches Selection = Yes, I'll be participating in person.

Then Informz - Add Interest and Show Text on Landing Page

Add Another Action

Click to Name Workflow

If Question Answered matches Selection = Yes, I'll be participating virtually.

Then Informz - Add Interest and Show Text on Landing Page

Add Another Action

Click to Name Workflow

If Question Answered matches Selection = I'm not sure yet.

Then Informz - Add Interest and Show Text on Landing Page

Add Another Action


# Nurture Campaigns

A relationship-building campaign meant to motivate interested contacts, over time, to take action — such as join, renew or register for an event.


Use cases:

- Nurture contacts who said a membership would be valuable but who have not joined.
- Re-engage contacts who told you they plan to earn a certification this year.

**Top Email (asae):**


  
The Center for Association Leadership

Earlier in the year you mentioned you were interested in pursuing your CAE. I'm dying to know if you've made any progress.

 **Amy Hemphill**  
Senior Director, Member Relations  
202-626-2789  
[ahemphill@asaecenter.org](mailto:ahemphill@asaecenter.org)

Have you had a chance to begin the pursuit of your CAE?

**Bottom Email (TIA):**

  
Transportation Intermediaries Association

A couple weeks ago, you said you were interested in becoming a TIA member, but we've noticed you haven't joined yet.

Are you still interested in joining TIA?

# Building lists

Compile a list of contacts based on activity in PropFuel, cross-referenced with your other data.

You'll want to use lists to:

- Find out who replied in a certain way across multiple check-ins
- See who took action (renew/join/register) in campaign(s)
- Create list used for nurture or other follow-up campaign

Know you're going to build a list based on certain reply types?

Use the **tag** feature within workflow actions.

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Use the **tag** feature within workflow actions.

The screenshot displays a CRM interface. On the left, a list titled "Didn't Renew Online" shows a table of contacts. The table has columns for "Contact Name" and "Contact Em". The contacts listed are Brian A (grinct), Daniel (sully2), Kristen (kgips), Jamie (jtollon), Edwin (edwin), David I (dpsm), Harold (harok), Artem (a.f.rut), and Angela (angel). Above the table are tabs for "Members" and "Settings".

On the right, a "Filters" panel is visible. It contains two filter rules, each with a "delete" button. The first rule is connected to the second by an "and" connector. The first rule consists of a "Question Selection" filter: "How would you like to renew? = Let's do it online right now." followed by a "Contact Field" filter: "Expiration Date < 2022-8-31". The second rule is connected to the first by an "or" connector. It consists of a "Question Selection" filter: "Are you ready to renew? = Yep! Let's do it online right now." followed by a "Contact Field" filter: "Expiration Date < 2022-8-31". Each filter rule has an "Add Filter" button below it.

Contact Name	Contact Em
Brian A	grinct
Daniel	sully2
Kristen	kgips
Jamie	jtollon
Edwin	edwin
David I	dpsm
Harold	harok
Artem	a.f.rut
Angela	angel

# Conversational Inbox

A shared inbox within PropFuel for continuing the conversation with members and prospects

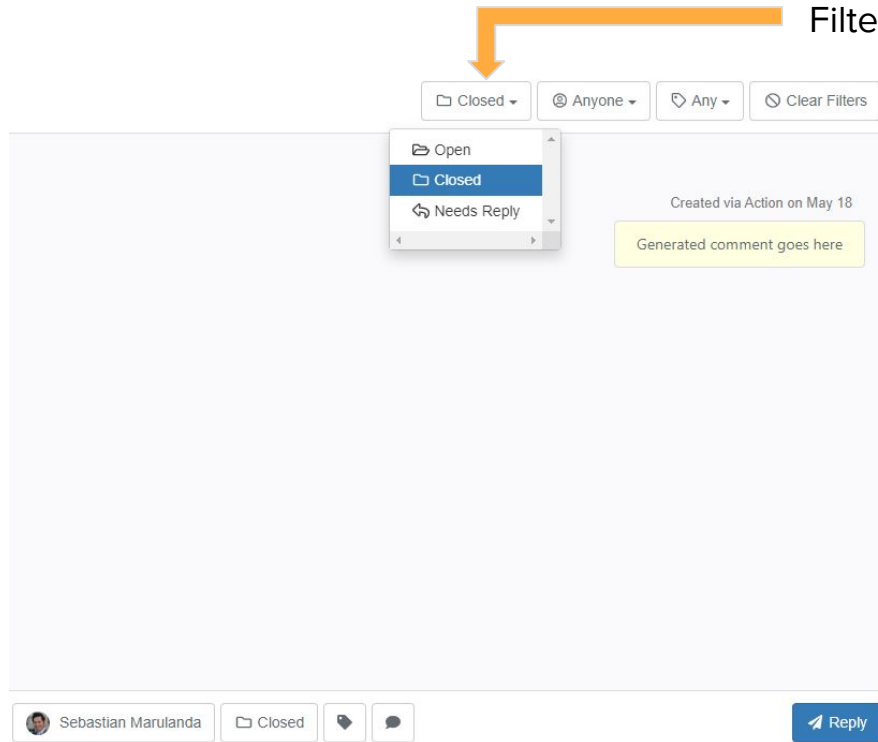
You'll want to use this instead of Outlook/Gmail when...

- **Replying is a shared responsibility**
  - More than 1 person is responsible for replies
  - More transparency desired
  - Want to take notes and collaborate on a reply
- **Open-ended responses should be stored/tracked**
- **Campaign overlaps with vacations/time off**
- **You really like visual to-do lists**



# Conversational Inbox

Filters (to stay organized)



Internal notes are in yellow

Who assigned to

Internal tags and comments

# Conversational Inbox

[REDACTED] answered a question on Jan 13

Please tell us more. In what ways do you find NQF valuable to your work or professional development?  
Great networking, thoughtful conversations, innovative approaches to longstanding problems in health care

Hassana Howe replied via email on Feb 7

**Re: National Quality Forum Requests Your Feedback**

Hi [REDACTED]

Thank you for your member testimonial and positive rating. My name is Hassana Howe and I'm the new Membership Director at NQF. Please don't hesitate to reach out for any member support at [hhowe@qualityforum.org](mailto:hhowe@qualityforum.org). Also, would you be open to NQF using your testimonial for future marketing promotions? Thank you for your consideration in advance.

All the best, Hassana

Hassana Howe, CAE | Membership Director  
[hhowe@qualityforum.org](mailto:hhowe@qualityforum.org)  
Direct Line 202.559.9402 | Main Line 202.783.1300  
<http://www.qualityforum.org/>

**NATIONAL QUALITY FORUM**  
Driving measurable health improvements together

[REDACTED] replied via email on Feb 7

**RE: National Quality Forum Requests Your Feedback**

Absolutely

[REDACTED] answered a question on Apr 25

☰ Is there anything we can do to help you reinstate your membership?  
**Yes – I need a copy of the invoice**

Brian Stevenson replied via email on Apr 26

**Re: Is there anything we can do to help?**

Hello [REDACTED]

I hope all is well.

Thank you for your response about your organization's membership. As requested, I have attached the renewal invoice below for the 2022 membership year. The invoice has its attention to [REDACTED] as she is listed as the primary contact for the membership. If this has changed and the invoice needs to be updated, please feel free to let me know.

Also if any additional documentation is needed such as our credit card payment form or a W9, please let me know.

[Membership Invoice](#)

Best,  
Brian