

Member Profile Updates

1-17-23

Client Roundtable



Question:

**What's your biggest pain point
with your member data?**

Purpose of Profile Update Check-Ins

- **Clean up old data**
- **Enhance/add new fields**
- **Make it EASY (for you and your members)**



PropFuel is a win-win solution!

For You:

1. Want/need this info
2. Reduce timeline for replies
3. Use connectors to write-back data without manual entry
4. Update over time (not just when they sign up)

For Your Members:

1. Helps ensure deliverability
2. Need it to be easy (no login)
3. Allows them to share interests to increase relevance
4. Periodic reminders so they don't have to remember



Question:

**What fields are you hoping to
update this year?**

Alternate Email Address



You probably know this already, but... Given the dangers that companies are facing as they quickly ramp up their operations, HR professionals are in high demand now. The Great Resignation is upon us. We want to make sure we stay connected with you even after you get swept off to your next great career adventure.

Do you have a personal email address to note in your member profile in case your primary email no longer works? If so, you may win a PIHRA branded gift!

Yes

No

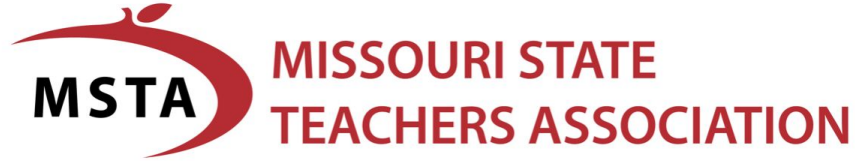
WIIFT?

(What's in it for them?)

PIHRA captured
236 alternate emails,
and counting...



Magazine Preference



Hi ,
For more than 100 years, MSTA has produced School & Community magazine, sharing the stories of Missouri educators like yourself. Did you know we also offer School & Community [as a digital publication](#)? We want to make sure you're receiving the magazine in the format you enjoy best.

How would you prefer to receive School & Community magazine?

Digital Only

Keep mailing a print version

“

We have [17,023] members who could receive the physical magazine but instead have opted for digital only...That represents a cost savings of [\$34,216] per year for the organization.

”

-Missouri State Teachers Association



Current role

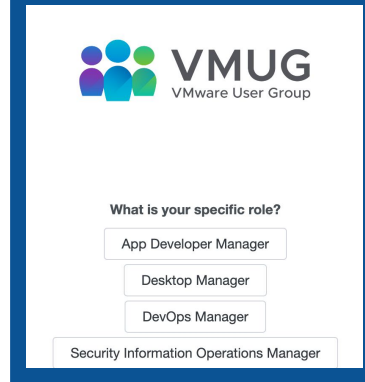





To maximize your VMUG membership experience, we want to make sure we have the most up-to-date information regarding your current role at work. As our events and content offerings continue to expand, your updated profile information will ensure we are delivering you the most relevant content for your career advancement.

Which of the below best describes your current role?

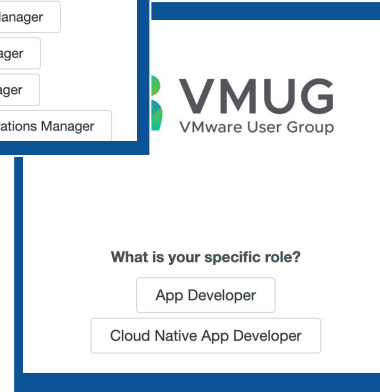
- Manager
- Developer
- Admin
- ...





What is your specific role?

- App Developer Manager
- Desktop Manager
- DevOps Manager
- Security Information Operations Manager





What is your specific role?

- App Developer
- Cloud Native App Developer

5,925 individual fields were updated in Salesforce via this single campaign. 



Primary and Secondary Area of Practice



Hi Colleague,

Knowing your practice area helps the TBA send you information that is relevant to your practice. Answer two questions and we'll update your profile for you!

What is your primary area of practice? (Select one.)

Business Law

Criminal Justice

2,303 primary area of practice fields filled + **1,754** secondary areas of practice fields filled.



What is your secondary area of practice? (Select one.)

Administrative Law

Adoption Law

Animal Law

Appellate Practice



Scientific Area of Interest



AMERICAN
SOCIETY FOR
MICROBIOLOGY

Tell us more about yourself

Answer the question below so we can tailor your experience and provide content that interests you.

What scientific topic is of most interest to you?

Antimicrobial Agents and Resistance

Applied and Environmental Science

Clinical and Public Health Microbiology

Clinical Infections and Vaccines

WIIFT?

(What's in it for them?)

3,292 fields filled with a
single check-in... SO FAR !



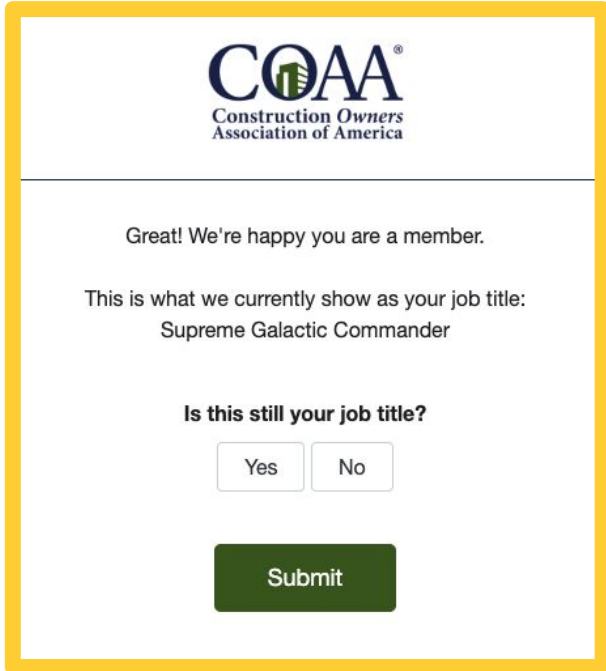
Other Questions to Ask...

- What is your preferred first name?
- Is this still your title?/What is your current title?
- Is this still your correct graduation date?/When is your anticipated graduation date?
- What is your alternate phone number?
- Is this still your correct mailing address?/What is your current mailing address?
- What is your birthdate?



PropFuel Tips and Tricks

Show your contacts what data you already have

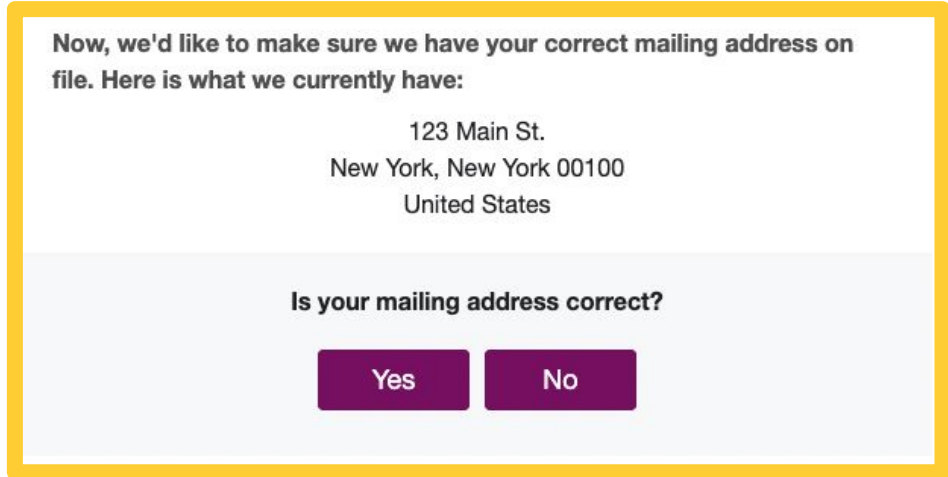


COAA[®]
Construction Owners
Association of America

Great! We're happy you are a member.

This is what we currently show as your job title:
Supreme Galactic Commander

Is this still your job title?



Now, we'd like to make sure we have your correct mailing address on file. Here is what we currently have:

123 Main St.
New York, New York 00100
United States

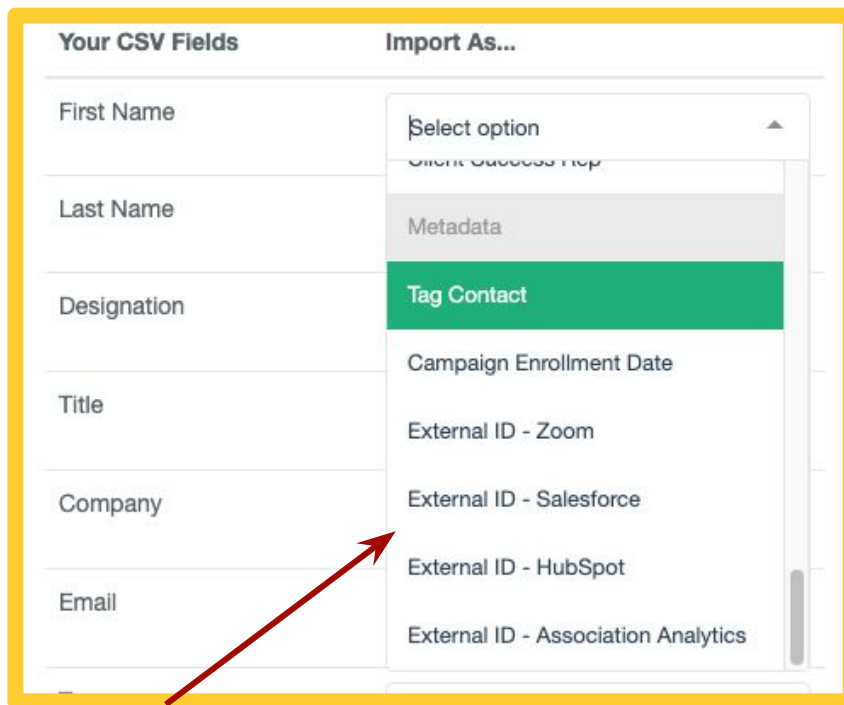
Is your mailing address correct?

ProTip: Don't forget to set the **Default Personalization Value** for your custom fields.



PropFuel Tips and Tricks

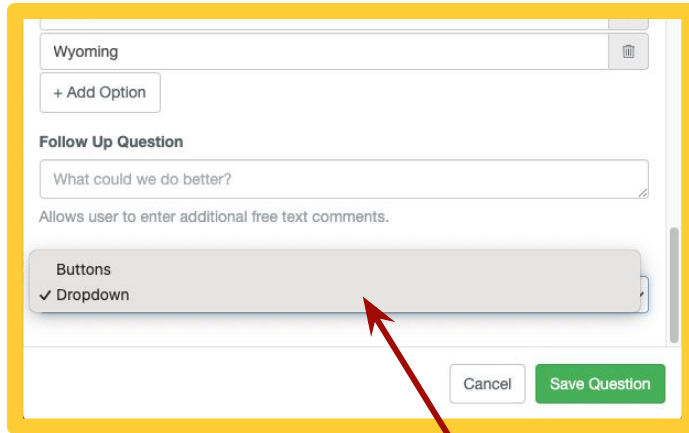
- **Profile updates can only occur if the contact is either:**
 - Pulled in through a connector, or
 - Imported into the campaign with the External ID field mapped to the correct system



PropFuel Tips and Tricks

- **Use Dropdowns for long lists**

- This is selected when you create your question
- You can also select variable or full width buttons



Wyoming

+ Add Option

Follow Up Question

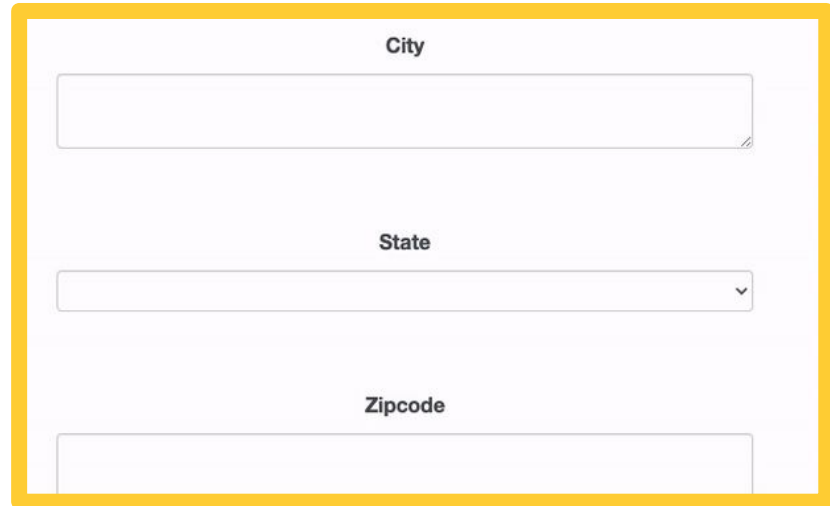
What could we do better?

Allows user to enter additional free text comments.

Buttons

✓ Dropdown

Cancel Save Question



City

State

Zipcode

ProTip: PF can only write back to single-select, open text, date or checkbox fields.



PropFuel Tips and Tricks

- Use branching to narrow choices

Which of the below best describes your current role?

Manager

Developer

Admin

Architect

Engineer

Lead

Director

Other

Manager option branches to

What is your specific role?

App Developer Manager

Desktop Manager

DevOps Manager

Security Information Operations Manager

Network Manager / Admin

Developer Manager

PropFuel Tips and Tricks

- **Create new fields in your AMS to capture new data**
- **Not everything has to be an AMS profile update**
 - (...and not everything can be)
- **Profile update limitations**
 - **Cannot update multi-selects** 😭
 - **Can update single-select, open text, date or checkbox fields.**
 - **Can't update Parent, Company, or Linked records, only individual**
 - **Each connector is different – check the documentation and/or have a conversation with your Client Success Manager**

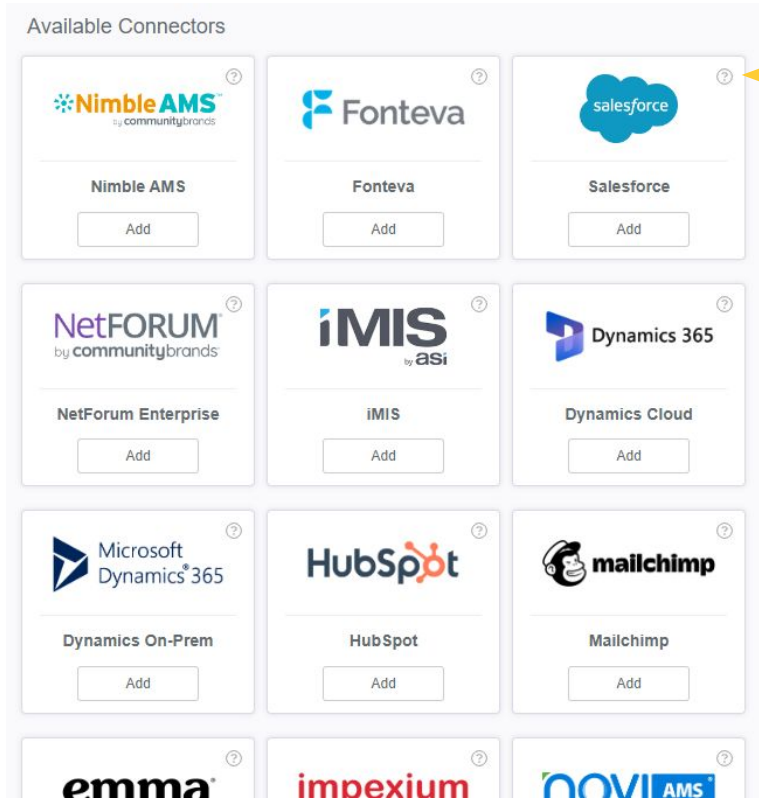


PropFuel Tips and Tricks

**TEST THE
CHECK-IN**



Check our help documentation for connector details!



Click the ?

under Settings/

Advanced/Connectors

