

Nurturing and Nudging



Client Roundtable

May 23, 2024



POP IN CHAT:

What are you most hoping to get out of our roundtable today?



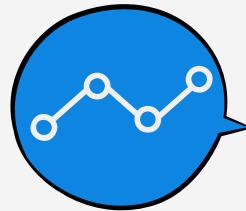
Goals for today:

- Share lots of example nurture campaigns!
- Talk about strategies to nurture and nudge
- Look at ways to get from intent to action!



ASK

Engagement begins with a question.



CAPTURE

By listening we learn more about the member.



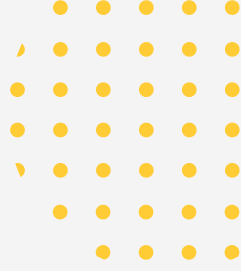
ACT

Member intelligence drives a personalized actions.



Nurture Campaigns

- Onboarding
- Renewals
- Lapsed
- Certification
- Acquisition
- Profile Updates
- Volunteers
- Sponsors
- Member Engagement
- Member Testimonials



POP IN CHAT:

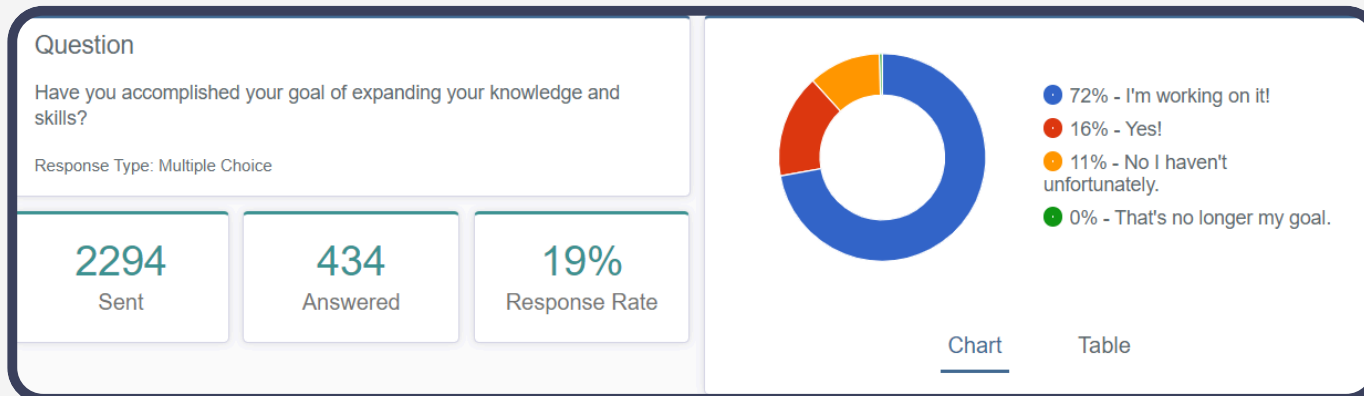
What's one campaign or engagement effort where you could use more nurturing?



NEW AND EXISTING MEMBER GOALS

International Society for Technology in Education includes the question **“What are you most hoping to get out of your ISTE membership this year?”** in their onboarding and renewed member engagement campaigns.

Based on their response, 6 months later that member then receives an automated follow-up to ask if they’ve accomplished their goal so far.



ISTE

Hi Melissa,

A few months ago you shared that your #1 goal for your ISTE membership this year was to expand your knowledge and skills.

I'm checking in to see how that's going so far!

Have you accomplished your goal of expanding your knowledge and skills?

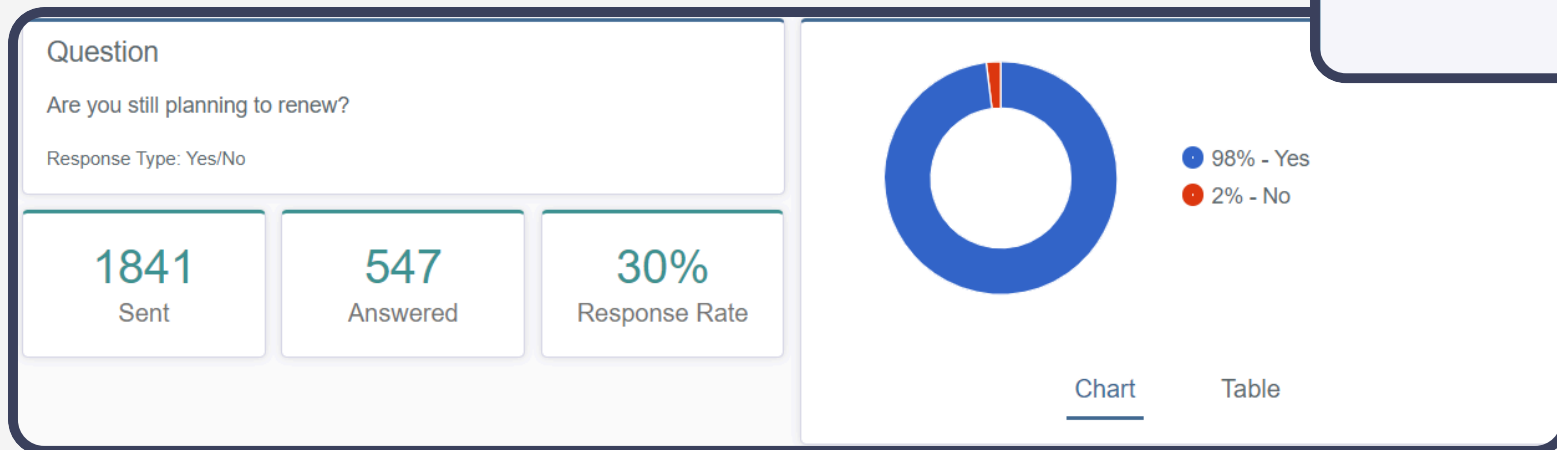
- Yes!
- I'm working on it!
- That's no longer my goal.
- No I haven't unfortunately.

Lauren Kelly
Director of Membership and Community
lkelly@iste.org

RENEWAL NURTURE

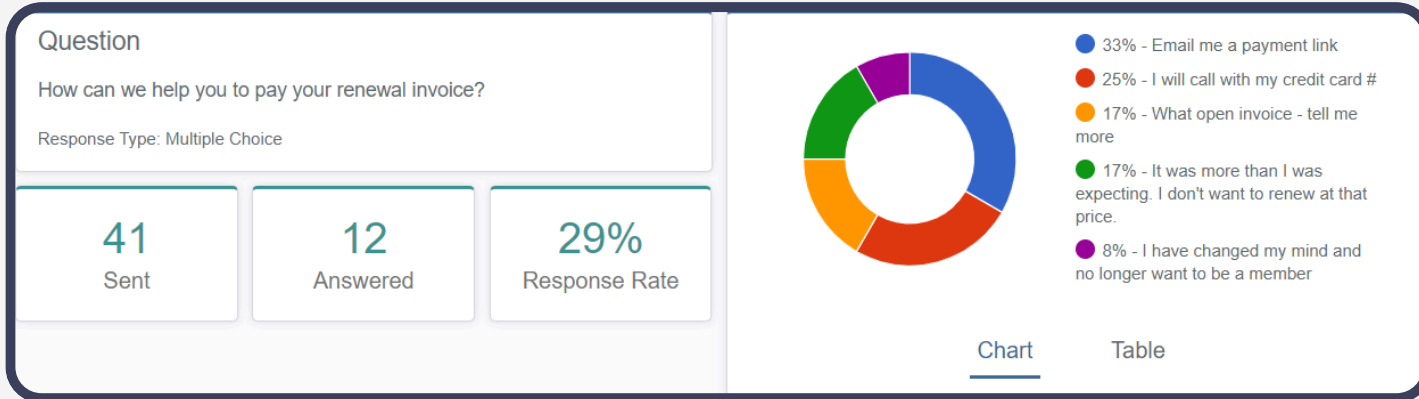
American Academy of Pediatrics has an automated nurture campaign as part of their PropFuel renewal campaign.

Over the past 3 years, 44% of members that said “yes” to renewing didn’t do so within 1 month, and were then entered into this campaign.



UNPAID INVOICE RENEWAL NURTURE

New York State Veterinary Medical Society reached out to those who requested a renewal invoice, but hadn't paid it yet to check if they need assistance.



2024 Dues Unpaid

Hi Dr. ,

Thanks for responding to our earlier emails, when you asked us to create a renewal invoice for you, so you will be an NYSVMS member in 2024.

Our records show that the invoice isn't paid yet, so we want to check in with you and see what's up.

How can we help you to pay your renewal invoice?

Email me a payment link

I will call with my credit card #

What open invoice - tell me more

I'm not sure about renewing- what are the benefits?

I have changed my mind and no longer want to be a member

I already paid - please check your records

It was more than I was expecting. I don't want to renew at that price.

CERTIFICATION NURTURE

Professional Risk Managers' International Association reached out to individuals that didn't have a certificate to ask if they were interested, along with an offer for a free practice exam.

Those that expressed interest were then reminded the day of the enrollment deadline to check in on their plans.



Hi Colleague,

Thanks for letting us know you were interested in learning more about the Operational Risk Management (ORM) Certificate.

Our offer of a FREE practice exam ends TODAY (savings of \$99)!!

You must enroll in the ORM program today to take advantage of this offer.

Do you want to take advantage of this offer today?

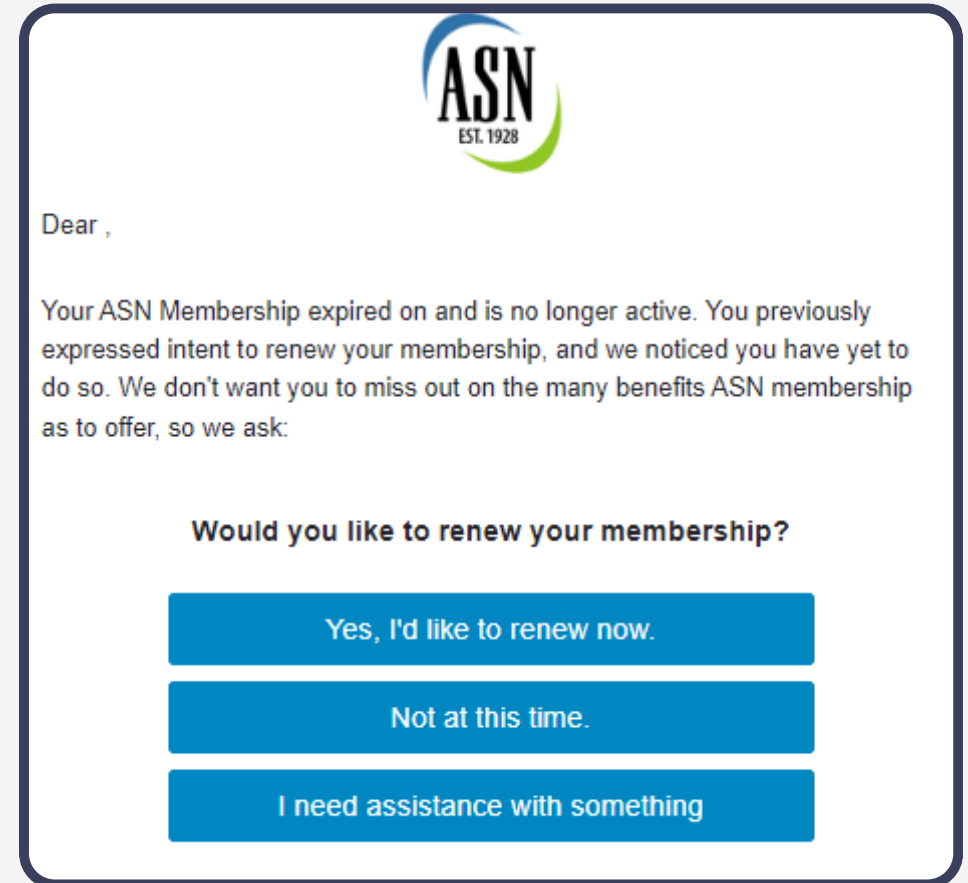
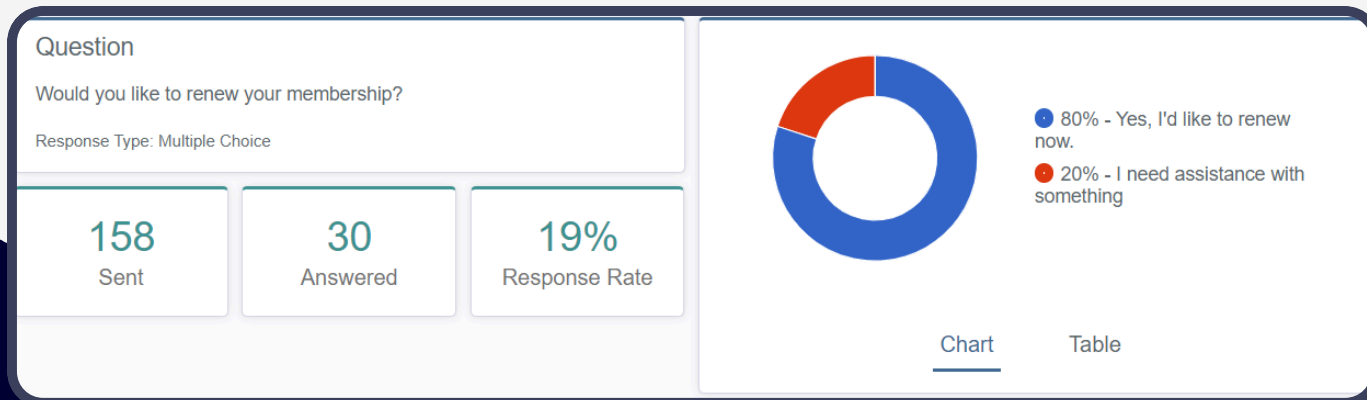
Yes, I do

No, not today

GRACE AND LAPSED WIN-BACK

American Society for Nutrition has an automated nurture campaign as part of their PropFuel grace and lapsed winback campaigns.

Over the past 2 months, only 25% of those that say “yes” to renewing do so within the first week. This nurture campaign then picks up to continue the engagement and see who needs assistance.



STUDENT ACQUISITION/CONVERSION

Golf Course Superintendents Association of America reaches out before and following a student's graduation to ask if they've secured employment in the industry.

If yes, they get entered into a campaign that will then ask if they're ready.



Hi ,

With your graduation approaching and your future plans taking shape, we're eager to hear about your next steps! If you've secured a job, we'd love to hear the details. If you're still in the job search phase, don't forget to explore our free Job Board. Regardless of where your path leads, remember that GCSAA is here to support you every step of the way.

Congratulations on your upcoming graduation! We wish you the best as you embark on this exciting new chapter in your life!

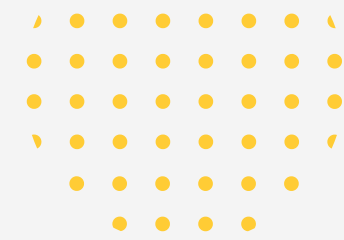
Do you have a job lined up for after you graduate?


Yes, I do in the turfgrass industry

Yes, I do outside the turfgrass industry

No, I'm still looking

STUDENT PROFILE UPDATES





ADVANCING EMERGENCY CARE

Hello Dr. Bittner,

Congratulations on completing your residency training! We want to make sure we can stay in touch with you in the future, so please verify we have your correct contact information.

Personal email address: melissa@propfuel.com
Cell phone: 123-456-7890

Do you have any updates to share?



ADVANCING EMERGENCY CARE

Thanks for letting us know!
We also know it's likely you may be moving following your residency, so let us know...

Have you or are you planning to move this year?

Please share with us your updated mailing address if you've recently moved.

If they say they are planning to move, but don't provide an updated mailing address, they get the following email 2 months later.


ADVANCING EMERGENCY CARE

Hello Ms. Bittner,

A couple months ago you told us you may be moving, but did not share an updated mailing address.

The current mailing address we have on file is:
**123 Main Street
Somewhere, VA 12345**

Do you have an updated mailing address to share with us?


This will help us ensure you receive valuable member info by mail.
Thanks in advance for your reply!

CALL FOR VOLUNTEERS NURTURE

TXCPA sent check-ins out to existing volunteers and members to ask if they would be interested in volunteering in the new year.

For those that said “yes” or “maybe,” they received a nurture check-in to confirm their interest and how they would like to volunteer.

368
volunteers
recruited



Thank you for your interest in volunteering!

Please choose the option below that best fits your interest(s).

- Committee or task force service for TXCPA.
- Providing an article for TXCPA member communications.
- Presenting a session at a TXCPA continuing education program.
- Visiting with schools and students about career opportunities in accounting.
- I'm interested in learning about more than one of the options above!



POP IN CHAT:

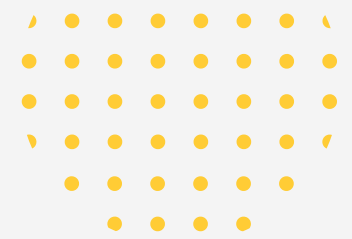
Are there any of these ideas
you plan to implement?



Strategies to get responses

- Ask your question a few different ways (and more than once!)
- Give something of value before you ask
- Collect feedback as a member benefit
- Plan and automate when possible!

SPONSOR ENGAGEMENT



NACUFS is here to help you connect with campus dining professionals.

Are you interested in gaining more exposure for your brand with collegiate foodservice operators?

Yes!

Maybe, send me more information.

Not at this time.



Opportunity awaits!

What is your greatest challenge in selling to colleges and universities?

Meeting operators

Building the relationship

Showing our product's value

Brand exposure

Something Else



We want to help you reach your prospects!

What would be your ideal way to showcase your brand and product to collegiate dining operators?

Print advertising

Digital Advertising

Event sponsorship

Exhibiting at a tradeshow

All of the above

Something else

10%

engagement rate overall:
298 responses from 241 individuals

MEMBER TESTIMONIALS



We want to take a moment to tell you how much we value your membership in AWWA. Even more, we want you to know how much we appreciate you here in the New Jersey Section. We know that each and every day, you work hard to protect public health and ensure that our communities have safe and sufficient water. AWWA is stronger because of people like you!

To thank you for your membership, feel free to pick a prize from the choices below:

\$20 in "Conference Monopoly Dollars" to spend in the Section Bookstore at the 2024 Annual Conference

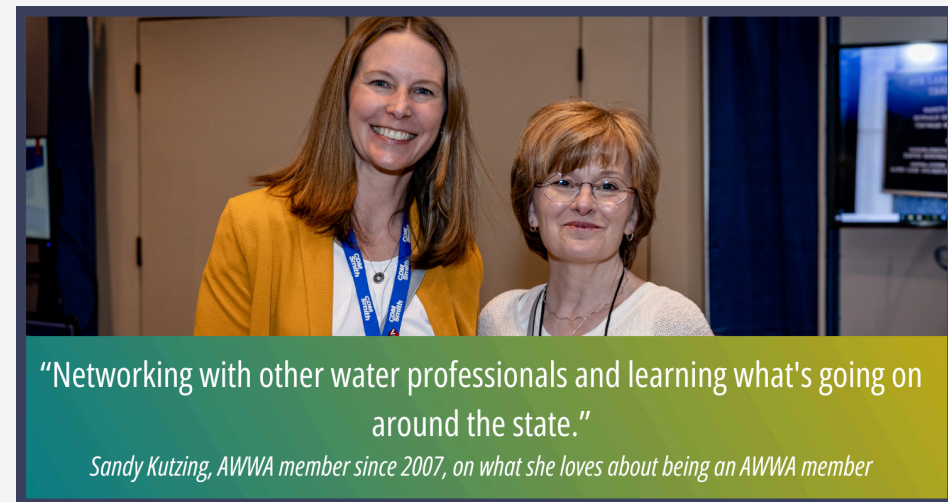
"Mystery Grab Bag" – We'll pick one of our logo/swag items and send it to you. . . who knows what you'll get!

\$5 donation to Water Equation in your name

Lunch with Mona (Mona will come to your office with a sandwich or a pizza for you!)*

No prize needed. Just happy to be a member!

86
new
testimonials



QUESTION OF THE WEEK



"What do other members do about _____?"

Good question!

(Almost) Every week we'll be asking you one question regarding various aspects of association management. When you submit any of the selections below, you'll see the answers from previous polls.

Thanks for participating!

P.S. - Have a question you want to ask other members? [Let us know.](#)

If your staff is still working remotely, how is it going?

Better than expected, everyone is engaged and productive

Most employees are pulling their weight but there are one or two that are concerning

It would have been better if we had returned to the office full time early on

Member service is a concern

Other

Not relevant to me, but I want to see the answers from previous questions

Thanks for participating!

We will be sharing these poll responses through future Questions of the Week, so stay tuned and keep responding :)

Have a question you want to ask other members? [Let us know.](#)

If last week's question isn't up yet, it will be. This part is manual. Thanks for your patience!

Member Insights Powered by [PropFuel](#)

If your staff is still working remotely, how is it going?

50 Responses

40% - Better than expected, everyone is engaged and productive

34% - Not relevant to me, but I want to see the answers from previous questions

12% - Most employees are pulling their weight but there are one or two that are concerning

8% - Other

4% - It would have been better if we had returned to the office full time early on

2% - Member service is a concern



- 40% - Better than expected, everyone is engaged and productive
- 34% - Not relevant to me, but I want to see the answers from previous questions
- 12% - Most employees are pulling their weight but there are one or two that are concerning
- 8% - Other
- 4% - It would have been better if we had returned to the office full time early on
- 2% - Member service is a concern

SEGMENT AND AUTOMATE ENGAGEMENT: STUDENTS



Melissa - Welcome to the Idaho Society of CPAs!

There's so much you can do with your student membership. We'd like to point you in the direction of the benefits and resources you care about most.

What are you most hoping to get from your membership?

Educational opportunities

Advancing my career

Advocating for the profession

ISCPA's Universal CPA Review Program

I'm not sure yet

Sincerely,

Laura Lantz
Executive Director
Idaho Society of Certified Public Accountants



Melissa,

As you finish your education, the Idaho Society of CPAs (ISCPA) would like to help provide you with all the information and tools possible to facilitate your success!

What are your career plans?

Take the CPA exam ASAP!

Work while taking the exam.

I love accounting, but am NOT getting the CPA.

Sincerely,

Laura Lantz | Idaho Society of CPAs
Executive Director
Idaho Society of Certified Public Accountants



Melissa- While your student membership with ISCPA gives you access to a plethora of resources and content, we want to make sure we can stay connected with you throughout your journey, even after you graduate.

Would you please provide us your personal email address, so we don't "lose you" after you leave school?

Yes

No

Sincerely,

Laura Lantz | Idaho Society of CPAs
Executive Director
Idaho Society of Certified Public Accountants



POP IN CHAT:

Do you have any questions for your fellow PropFuel users?



**Features to help you nurture
and nudge your members...**



BLUEPRINTS

The quickest way to build a new campaign in minutes!

The screenshot displays the APFC (Association of Professional Feedback Curators) dashboard. The top navigation bar includes the APFC logo, the text "Association of Professional Feedback Curators", and user options for "Switch Teams", "Help", and "Megan Sloan". A left-hand sidebar contains navigation links for "Inbox", "Insights", "Contacts", "Lists", "Campaigns", "Settings", "My Profile", and "Super Admin".

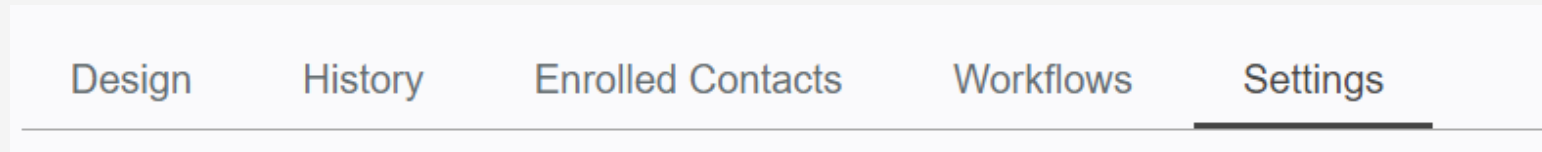
The main content area is divided into two sections. The "Pinned Campaigns" section features a card for "A Client - New Member Onboarding". This card includes tags for "Professional Association", "New Member Onboarding", and "EXAMPLE". It also displays the status "Active", creation date "May 4th, 2022", and next check-in date "Mar 1st, 2024".

The "Campaigns" section contains a table of active campaigns. Above the table are filters and a "Create New Campaign" button with a dropdown menu that includes "Create From Blueprint".

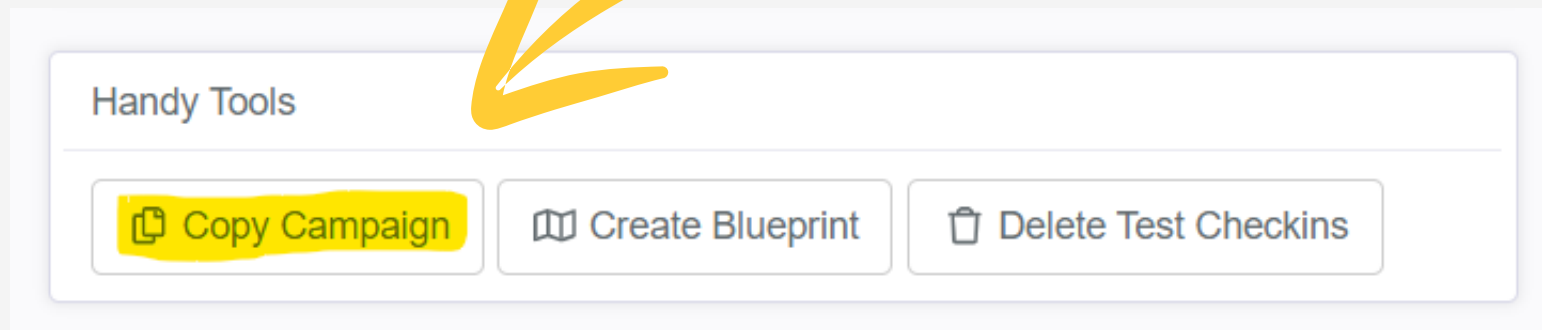
Campaign Name	Status	Channel	Interaction	Activity	
1.22 Test Campaign	Draft	Email	Outbound Scheduled	Created on Jan 22nd, 2024	Edit ...
2024 Renewal EXAMPLE Not launched	Draft	Email	Outbound Scheduled	Created on Dec 14th, 2023	Edit ...
2024 Renewal - Embed Question Member Renewals Under Review	Draft	Web/External	Landing Page	Created on Dec 14th, 2023	Edit ...
2024 Renewal - Embed Question EXAMPLE Member Renewals	Draft	Web/External	Landing Page	Created on Dec 14th, 2023	Edit ...

COPY CAMPAIGNS

If you already have a related campaign in PropFuel, copy it and modify it to create a nurture campaign!



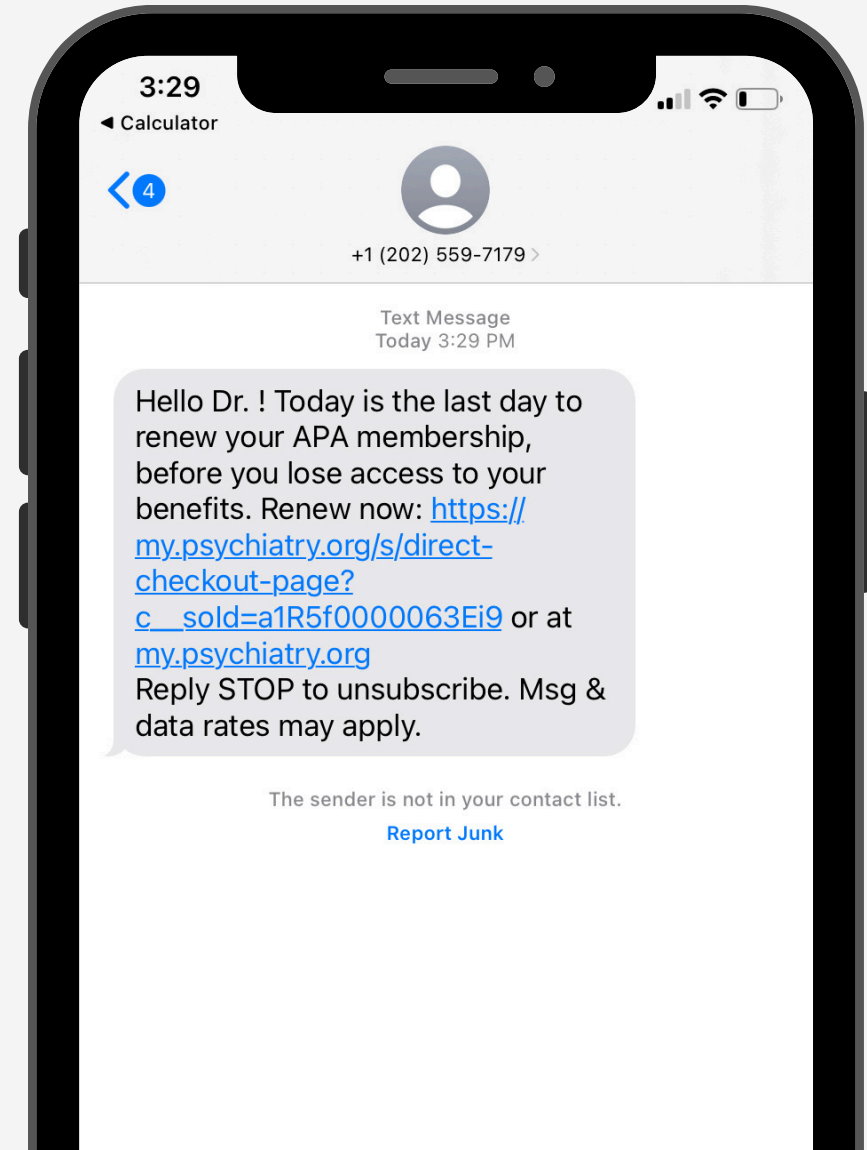
Within the campaign settings, scroll down to “Handy Tools”



INTEGRATE SMS

Nearly 50 of our association clients, including the American Psychiatric Association have added SMS functionality to their PropFuel account.


New for 2024: Add embed campaigns to SMS messages.



ALERTS

Configure an alert to your inbox based on a member's response.

Edit Action ✕

 Send Alert

Recipient(s) ✕


Subject

Email Body Text

Delete



This is an automated email from PropFuel.
To reply to the contact, use the buttons below.



[PropFuel Alert] Lapsed Win-Back Campaign

Please contact this member about rejoining.

Why are you hesitating to renew?

Something else
Can someone contact me? I have questions.

Melissa Bittner
melissa@propfuel.com

REPLY 1-ON-1



Reply via email or within PropFuel Inbox to continue the conversation.

Melissa Bittner answered a question at 10:14 PM

☰ Why are you hesitating to renew?
What would make you reconsider?

Something else

Can someone contact me? I have questions.

From: Melissa Bittner **To:** Melissa Bittner **Subject:** Re: [TEST] Why haven't you renewed?

🔍 B / ☰ **A** ☰ ☰ 🔗 📎 ↶ ↷ <>

Melissa Bittner
Client Success Manager
PropFuel
melissa@propfuel.com

Melissa Bittner answered a question

Something else

Can someone contact me? I have questions.

Cancel Templates **Send**

APFC

Inbox

Open Any Anyone Any Clear Filters

Molly Member 02/16/2023
Welcome! Msg & Data rates may appl...

Ryan Graham 06/23/2022
I'd love to check out the directory - can y...

Ryan Graham 06/22/2022
New Primary Contact

Molly Member via SMS on 02/14/2023
Where can I pick up my conference badge?

Ashley Wucher via SMS on 02/14/2023
Hi Molly, we're in the first floor lobby and have your badge here. We'll be here until 5 p.m. today and again tomorrow morning starting at 8.

1 - 5 of 5 Unassigned Open Reply



Product Updates!

