

Evergreen Campaigns: Set it and (almost) forget it!



Client Roundtable

July 30, 2024



POP IN CHAT:

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



WHAT IS AN EVERGREEN CAMPAIGN?



Sequence (drip) campaigns that **continuously enroll**, nurture and engage your audience with **timeless** content, guiding them through a journey **without the need for frequent updates.**





WHAT ARE THE KEY BENEFITS?

- Consistent Engagement (even when you're busy)
- Reduced Workload (set and *almost* forget)
- Long-term Value and Use
- Support Other Campaigns



EVERGREEN CAMPAIGNS THROUGHOUT THE MEMBER JOURNEY

1. Acquisition
2. Onboarding & Member Engagement
3. Membership Renewal + Nurture
4. Win-Backs
5. Feedback

**Blueprints
Available**



RELEVANT BLUEPRINTS



- Member Acquisition
- New Member Onboarding
- Renewal Campaign
- Lapsed Win-Back
- Certification Renewal

Association of Professional Feedback Curators

APFC

Inbox
Insights
Contacts
Lists
Campaigns
Settings
My Profile
Super Admin

Pinned Campaigns

A Client - New Member Onboarding

Professional Association
New Member Onboarding EXAMPLE

Status: Active
Created on: May 4th, 2022
Next Check-in: Mar 1st, 2024

Campaigns

Create New Campaign

Campaign Name	Status	Channel	Interaction	Activity	Actions
1.22 Test Campaign	Draft	Email	Outbound Scheduled	Created on Jan 22nd, 2024	Edit ...
2.13 Test	Draft	Email	Outbound Scheduled	Created on Feb 13th, 2024	Edit ...





OTHER CAMPAIGN IDEAS

- Renewal Nurture
- Lapsed Nurture
- Member Engagement Campaigns (Years 2+)
- Certification Acquisition or Nurture
- Feedback (post-purchase or member support)
- Abandoned Cart (dues, products, event registrations)
- Member Satisfaction (NPS/CSAT)
- Profile Update Campaigns
- SMS Opt-Ins



POP IN CHAT:

What's something you're currently doing manually that could be automated/evergreen?

ACQUISITION

Oregon Society of CPAs

- Multiple drip campaigns tailored to prospect source
- Automatically enrolls prospects throughout the year
- Second nurture campaign for contacts who express interest in joining during the main campaign

Blueprint Available

The screenshot displays a 'Question Workflows' configuration screen. On the left, there are two 'Check-in' cards. 'Check-in #1' contains the question 'What is most important to you as you mar...' and an 'Add Question' button. 'Check-in #2' contains the question 'Are you interested in becoming an OSCPA...' and an 'Add Question' button. On the right, the 'Question Workflows' panel shows a question: 'Are you interested in becoming an OSCPA member?' with 'Yes' and 'No' buttons. Below this, there are options for 'Saved Workflows' and 'Create New Workflow'. The workflow is currently 'On'. It features two conditional paths: 1) 'If Question Answered matches Selection = Yes', which triggers 'Add to a Campaign - Prospects Nurture (Exam)', 'Remove from this Campaign', and 'Show Text on Landing Page'. 2) 'If Question Answered matches Selection = No', which triggers 'Redirect to Another Question - X - why not join?' and 'Remove from this Campaign'. A yellow arrow points from the 'Add Question' button of 'Check-in #2' to the 'Add to a Campaign' action in the 'Yes' path.

ONBOARDING

Oregon Society of CPAs

- Automatically enroll members as they join
- 12 check-ins over the member's first year
- Built from a blueprint!



OSCPA
Oregon Society of Certified Public Accountants

Your engagement makes our community even stronger. Please tell us a bit about yourself so we can get you started with the member resources and benefits you'll find most useful.

What are you most hoping to get out of your Oregon Society of CPAs membership this year?

- Growing my network
- Expanding my knowledge and skills
- Getting a job or promotion
- Saving money
- Something else

OSCPA
Oregon Society of Certified Public Accountants

At Oregon Society of CPAs, we want to help you succeed. So we can point you to the benefits you need to do that, please let us know...

How would you describe where you are in your career journey?

- Just starting out.
- Mid-level.
- Experienced.

OSCPA
Oregon Society of Certified Public Accountants

We'd like to make sure you're getting the information you need from Oregon Society of CPAs, nothing more and nothing less! Let us know, as we can help you make any necessary changes to what type of information you're getting, and how often you're getting it.

Are you getting the right information from Oregon Society of CPAs?

- Yes! I'm all set.
- I'd like to update my preferences now...

ONBOARDING

ISTE

- Automatically enrolls contacts via Fonteva
- Running since May 2022:
 - Over 37,000 contacts
 - Nearly 700,000 emails sent
 - 29% engagement rate throughout



The home of edtech for over 40 years

Hi Melissa,

As ISTE's CEO, I'd like to thank you. Your engagement makes our community of educators and changemakers even stronger. Please tell us a bit about yourself so we can get you started with the member resources and benefits you'll find most useful.

What are you most hoping to get out of your ISTE membership this year?

- Network with peers
- Expand my knowledge and skills
- Further my career
- Save money with member discounts
- Something else

Richard Culatta
Chief Executive Officer

We're transforming teaching and learning

Hi Melissa,

We want to make sure we're sharing the most relevant opportunities and resources for you based on your role.

What's the easiest way for you to share a bit about you?

- Ask away! I'll answer 3 quick questions now.
- I'll update my profile on my own.

Answering these questions helps us make better decisions about the types of work we should be doing as an organization, and helps us see where we're serving well and where we need to improve.

Thank you in advance!

Lauren Kelly
Director of Membership and Community

Hi Melissa,

Now that you've been with ISTE for a while, I hope you've had a chance to get to know our fabulous team.

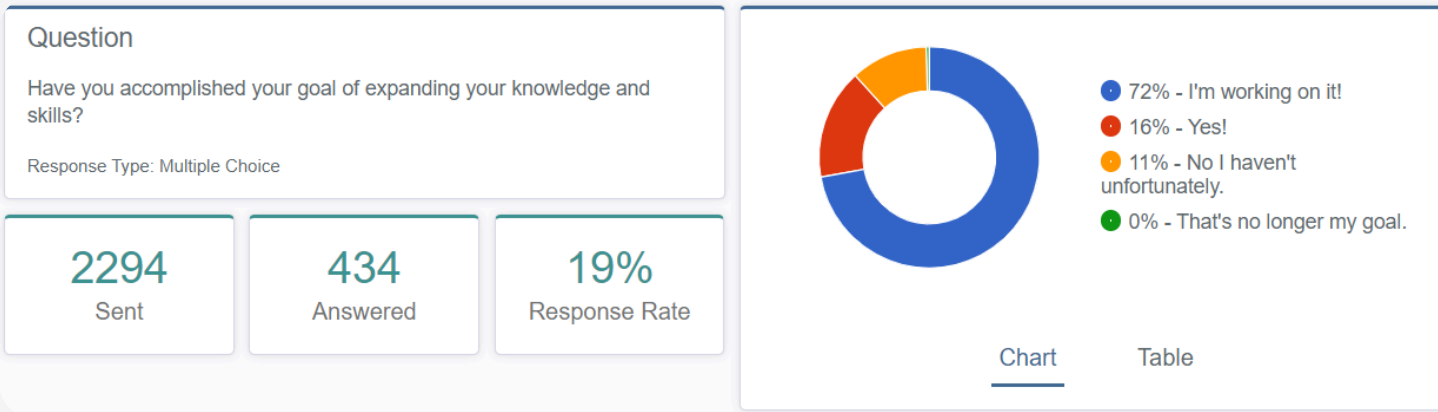
Is there at least one member of our staff you feel comfortable reaching out to if you need assistance?

- Yes
- Not yet

Margret Atkinson McGuinness
Community Engagement

ONBOARDING NURTURE

Automatic follow-up 6 months following initial question:
“What are you most hoping to get out of your ISTE membership this year?”



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



POP IN CHAT OR UNMUTE:

What manual processes for new members could you automate?

RENEWAL

PIHRA

- Automatically enrolls members 75 days before expiration
- SMS component (also automated) 25 days before expiration
- Alerts the PIHRA team when a contact selects certain answers, such as “I need an invoice.”



🎉 It's time for another year of PIHRA membership! 🎉

Your membership renewal is coming up on , and we'd like to help you renew when you're ready.

Are you planning to renew your PIHRA membership?

Yes - thank you for the reminder!

Yes - but I need more time.

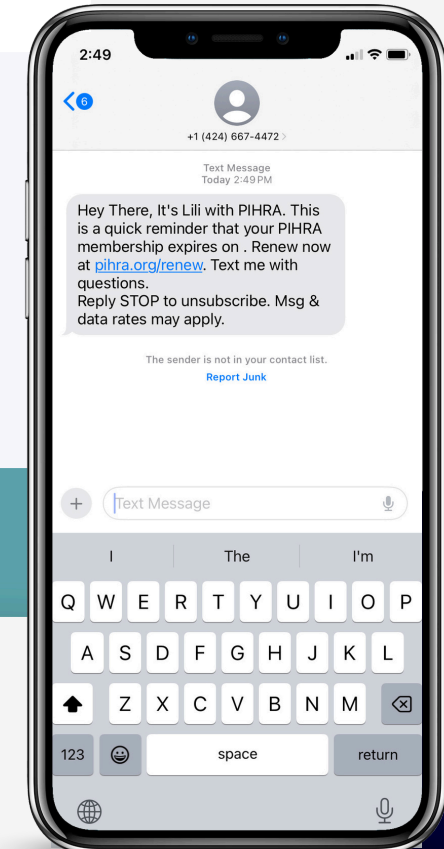
Yes - but I need an invoice.

No - I'm not planning to renew this year.

Professionals In Human Resources Association

18080 Crenshaw Blvd. #7909
Torrance, CA 90504-9998

**Blueprint
Available**



RENEWED MEMBER ENGAGEMENT

Michigan Restaurant & Lodging Association created a year-long campaign to nurture engagement after a member renews their membership.

Three segments:

- Restaurant Members
- Lodging Members
- Allied Members (service providers)

Each campaign highlights benefits, resources, and programs related to the specific member type.

Restaurant + Lodging

What would help you get more out of your Michigan Restaurant & Lodging Association (MRLA) membership this year?

- Networking and Community
- Training and Education
- Industry Communications
- Discounts and Savings
- Advocacy
- Workforce Solutions
- Something else

Blueprint Available

Allied

Where can we help you get more out of your Michigan Restaurant & Lodging Association (MRLA) membership this year?

- Networking and Community
- Industry Communications
- Discounts and Savings
- Reaching New Customers
- Something else

LAPSED WIN-BACK

NBMBA

- Automatically enrolls members 60 days after they lapse (and suppresses them when they rejoin).
- Enrolled 7,796 contacts over 7 months. **18%** have engaged with at least 1 check-in.
- Built from a blueprint!

“Campaigns that run continuously such as the lapsed member win back have yielded great results for us. It should definitely be the norm! 😊”

**Blueprint
Available**

NATIONAL
BLACK
mba[®]
ASSOCIATION, INC.

Colleague,

Your membership has lapsed, but we can help you renew so you can continue enjoying your NBMBA benefits right away.

Are you aware that your membership has lapsed?

Yes

No

Please do not forward this email

Can't get the button to work? Copy and paste this link:

<https://app.propfuel.com/checkin/c22bf8ab-9f50-456d-92ff-2eaa18a9226c>

[Unsubscribe](#)



POP IN CHAT OR UNMUTE:

How have you automated your renewal processes to maximize efficiency?

CERTIFICATION NURTURE

**Blueprint
Available**



You recently told us you were interested in pursuing your CAE. I wanted to check-in to ask if you've made any progress and how we can help!

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

Yes

No



Shaniece Brown

Manager, Member Relations - Individual Members
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That's great news!

Our next application deadline is September 27, 2024 to take the exam between December 1-14, 2024.

Learn more about what's required and how to prepare [here!](#)

We'll be in touch if you asked for some assistance.

Well, allow us to help you get started!

If you are still interested, here's what you need to do:

Step 1: [Determine your eligibility](#), including the necessary work experience and professional development criteria.

Step 2: [Apply to sit for the exam](#). The next application deadline is September 27th to sit for the December 2024 exam.

Step 3: [Prepare for the test](#) and [explore core resources](#).

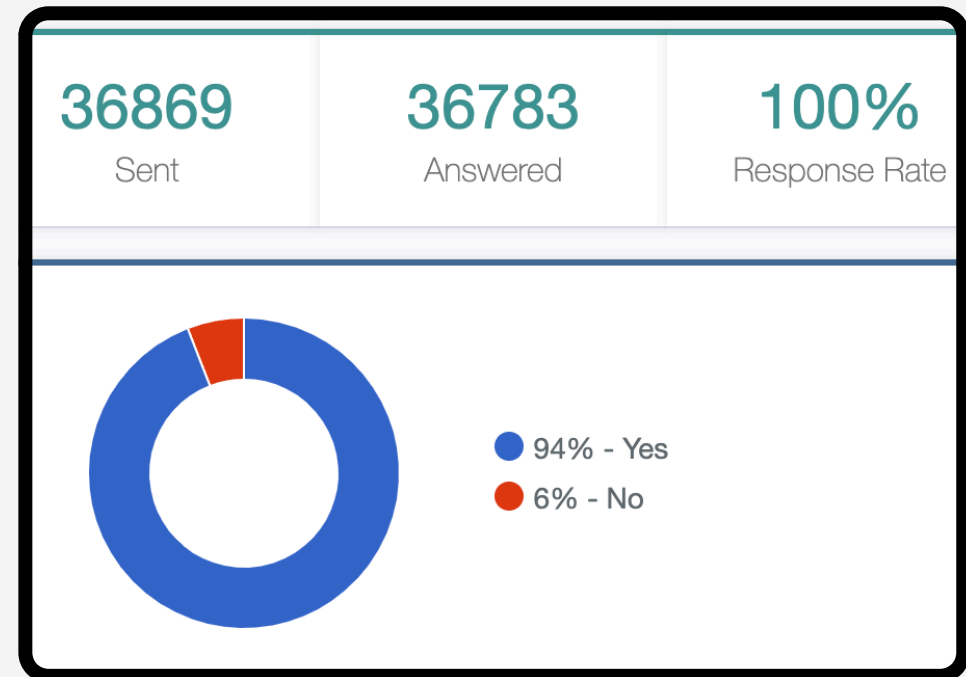
We'll send this to you via email. Feel free to reply with any questions!

POST-PURCHASE FEEDBACK

CoreNet Global embeds a PropFuel check-in into their order confirmation emails to obtain feedback on the user's experience. This campaign has been ongoing and active since 2019, netting over 36,000 responses. In addition, they've received over 3,700 open-ended responses.

Were you satisfied with the ordering experience?

What could be better?





POP IN CHAT OR UNMUTE:

What new ideas could help you increase your effectiveness and efficiency in your role?



Short on time? Don't forget to wave the magic wand!



- Email Template - Subject line
- Any workflow actions with a text editor
 - Send alert
 - Send email
 - Show text on a landing page



New Reporting Features!

Campaign History Tab

- Better graphs with more information
- One level deep embed question data
- Response rate in aggregate across all check ins
- Engagement rate - The % of contacts that have answered at least one question.

