Automation Rules Management

Knowing when and where to apply automation rules takes time and testing. Our staff will work with your team to provide ongoing strategic guidance and support of community member engagement and client goal attainment through automation rules.

For this package, our team will:

- Conduct discovery meeting to define engagement goals, objectives, and KPI's
- Work with you to determine automation rule strategy to achieve specific goals (retention, prospect conversion, community member engagement or re-engagement, event attendance)
- Define target audience(s)
- Develop schedule with you for campaign creation, creating up to one campaign per month.
- Create or customize up to 15 automation rules per goal, including conversion tracking, email templates and ribbons*
- Develop community gamification strategy for badging/ribbons, if applicable.
- Provide strategic guidance in developing campaign plans:
  - Key messaging and tone
  - Content and calls to action
  - Campaign elements and cadence
- Build email messages using client provided input (text, images, hyperlinks [where applicable])
- Construct the automated campaign:
  - Map out the campaign process flow
  - Build appropriate rule logic and conversion tracking
  - Build email messages using client provided input (text, images, hyperlinks [where applicable])
  - Define appropriate timing
- Evaluate performance of rules on a monthly basis and make adjustments accordingly.
- Create and perform A/B testing as needed to ensure optimum performance of rules.
- Analyze results and report results monthly

The Automation Rules Management package requires a minimum 12-month contract.

*If custom ribbon/badge artwork is desired, client to provide graphics.