HIGHER LOGIC
ALL TOGETHER

Marketing Automation Campaign Worksheet

In today's digital world, it is essential to cut through the clutter and personalize communications. You need to give your audience what they want, when and where they want it. Marketing automation gives you the tools to make this a reality.

The buzz around marketing automation is no joke. It makes big promises and can deliver big results if you take the proper steps. Need more proof before you jump in?

▶ A **313% increase in sales** followed Texas Medical Association's move to marketing automation

▶ Automated campaigns lead to a **201% increase in engagement** for Florida Association of Insurance Agents

▶ AARC **won back 800 members** in just 45 days by using automated campaigns

WWW.HIGHERLOGIC.COM

STEP 1

OUTLINE YOUR GOALS

What are your digital marketing goals?

_____

_____

_____

What are you trying to accomplish in this particular campaign?

- ❏ Win back lapsed members
- ❏ Re-engage members
- ❏ Increase non-dues revenue
- ❏ Other _____

How will success be measured?

_____

_____

STEP 2

SEGMENTATION

Develop audience personas:

→ Understand your audience to better provide information that speaks to them
→ Collect data on that persona via database searches, interviews, surveys, focus groups, etc.
→ Combine head (gender, age, etc.) and heart (motivations, expectations, etc.) data to develop a deep
   understanding of the persona

Check out our Persona Development Worksheet to help you build your own personas

HIGHER LOGIC
ALL TOGETHER
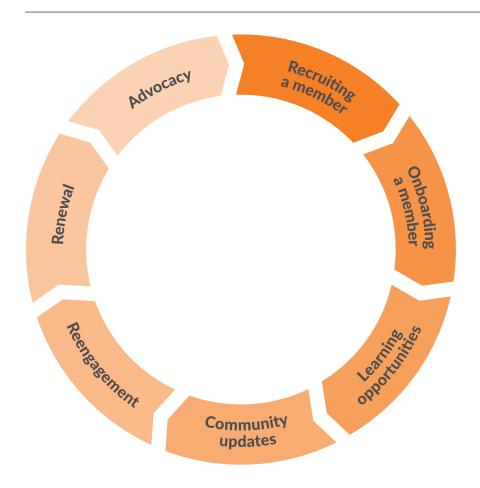
WWW.HIGHERLOGIC.COM

STEP 3

DEFINE THE LIFECYCLE

What is the path throughout the member lifecycle?

_____

What information is most important to share at each stage of the lifecycle?

_____

What will provide them the most value at each stage?

_____

HIGHER LOGIC
ALL TOGETHER

WWW.HIGHERLOGIC.COM

STEP 4

MAP CONTENT TO EACH LIFECYCLE STAGE

Recruiting a Member
Establish expertise to clearly show the benefits of being a member. Include testimonials.

Content to include:_____

Onboarding a Member
Provide log in information and detailed benefit information. Share how to get the most out of a membership.

Content to include:_____

Learning Opportunities
Provide opportunities for growth such as: classes, conferences, meetings, books, and articles.

Content to include:_____

Community Updates
Share new industry updates and hot topics.

Content to include:_____

Reengagement
Showcase opportunities to get involved and provide information based on their interests.

Content to include:_____

Renewal
Make renewal quick and easy, and remind members of the value.

Content to include:_____

Advocacy
Encourage life-long support of your organization and recruit volunteers.

Content to include:_____

HIGHER LOGIC
ALL TOGETHER

WWW.HIGHERLOGIC.COM

STEP 5

AUTOMATE CAMPAIGNS

TYPES OF CAMPAIGNS:

Welcome	Sent to a prospect or new member within 24 hours of joining. Consider including:	• Member Login Information • Link to Complete Member Profile • Tutorial Welcome Video Link • Accredited Educational Courses
Member Appreciation	Show the love. Opportunities include:	• Anniversaries • Special Occasions • Thanks for Contributing
Events	Think about how you want to communicate event information. Consider including:	• Save the Date • Initial Invitation – Early Bird Registration • 2nd Invitation – Register Today – Don't Delay • Registrant's Information – What you need to know before you go! • Thank You for Attending – Your Feedback Requested
Engagement	Think of opportunities to follow up with your audience after they have taken action OR not taken action. Actions may be triggered by form submissions, web page visits, course completion, or clicking on a specific email link.	
Nurture	Strengthen membership and provide value throughout membership. Web tracking page tags can help you drop subscribers writing tagged pages into a nurture campaign to provide relevant information they are interested in.	• Deliver Membership Value • Affirm Accomplishments • Recognize Participation • Motivate Future Renewal
Win Back	Gather your list of non-renewing or lapsed members and develop a campaign to encourage them to come back. Think of the value that would most interest them. Make renewal as simple and easy as possible.	

HIGHER LOGIC
ALL TOGETHER

WWW.HIGHERLOGIC.COM

STEP 5

AUTOMATE CAMPAIGNS

What kind of campaign are you going to run?

_____

What will the campaign structure be?

→ Which actions will result in emails sent?
→ Which emails will be sent again due to inaction?
→ Based on actions, what information do we want to provide?

Set up the campaign layout:

→ Label and make notes for each step of the campaign
  – Ex: length of wait step, intention of each step
→ Build the target group
→ Create each mailing
→ Test each mailing
→ Test the campaign flow
→ Activate!

Notes:

_____

_____

_____

_____

_____

HIGHER LOGIC
ALL TOGETHER

WWW.HIGHERLOGIC.COM

STEP 6

MEASURE EFFECTIVENESS

1. Analyze email metrics and performance of each message:

→ Open Rates
→ Click Rates
→ Form Fills (if applicable) / Conversion Rates / ROI

Is your audience engaging with the content you are providing? Does anything need to change or shift based on results?

_____

_____

2. Analyze web tracking reports to understand how campaign members are engaging with your website.

Were campaign goals met?

_____

_____

Notes:

_____

_____

_____

_____

_____

HIGHER LOGIC
ALL TOGETHER