
higher logic
Campaign Cookbook
House Recipes for Our 6 Most Delicious Marketing Automation Campaigns



Are you ready to cook up some marketing automation campaigns?

You've come to the right place. This campaign cookbook will walk you through everything you need to create six automated email campaigns. We chose the campaigns that reflect key association business processes. Jump to your favorite campaign at the right.

- Renewal
- Onboarding
- Prospecting with Content
- Event Support
- Community Engagement
- Internal

Where to Begin

- If you're new to campaigns and you're looking for an easy one to start with, try **onboarding.**
- If you're looking for the most impactful one, try the **renewal campaign.**

Before you get started, take a quick look at the **glossary** – this will help you get familiar with key terms we'll use in the cookbook.



Tools to Keep Handy

Have these items at the ready for building your campaigns.

Automation. For every campaign, you will need something to automate your campaign – a marketing automation system works great. Higher Logic's marketing automation software is built specifically for associations, and even includes starter kits that suggest the best cadence for your automated campaigns.

You'll need emails! Each campaign contains a series of messages that speak to the member or prospective member. For the best emails, make sure they're member-centric, focused on the benefits to the member. This resource has some tips for writing better emails.

Data. Who are the emails going to? It's a key part of each campaign, so we'll spend a lot of time discussing who to send to (and who not to send to).

Framework. Use this worksheet to help build your campaigns.

Let's get cooking!

Glossary of Marketing Automation Terms

Automated campaign: A series of communications, typically email, designed to tell the audience about one topic and get them to engage. Usually built in a marketing automation system.

Cadence: The order and timing of the emails and steps in your automated campaign.

Decision step: A step in an automated campaign that tells the campaign what to do in response to an action (e.g. the member has renewed; now remove them from the campaign).

CTA: A CTA is a call-to-action, asking the audience to take a specific step, whether that is clicking on a link, responding to the email, renewing membership, etc.

Web tracking: A tool for tracking a known user's web browsing behavior.

Landing page: A website page that shares information about a specific topic. In marketing, a landing page typically has a way to capture the visitor's information (a form, a chat tool, etc.).

Digital body language: The actions (or lack thereof) your member takes online that create a picture of their interests and habits.

Integration: A connection between two pieces of software that allows data to flow through.

Mute campaign: An option within an email campaign to unsubscribe for just that specific campaign.



Renewal Campaign

What's your membership renewal process currently like? If you're still sending emails one-by-one, members forget to renew, or your grace period is starting to stretch on and on, you should definitely try building a campaign. An automated email campaign can help you save so much time and achieve great results on retention.

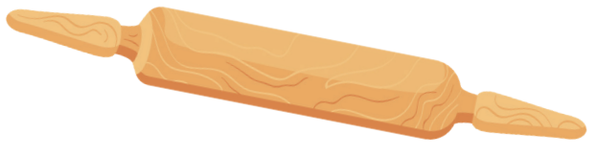
With a renewal campaign, you are using automation to communicate with members periodically before their renewal expires. You're sharing about their benefits, things coming up in the new year, what they'll be missing out on, etc., all in a measured, planned way. Delicious!

INGREDIENTS

Note: *For each campaign, you'll need the tools we noted at the beginning, but we'll make notes where needed on the specific details.*



- **Emails:** We like to have seven emails in the renewal flow, but you should adjust this to your audience's habits.
- **Your data.** This includes two lists: Members who need to renew, and members who have already renewed.



PRE-RECIPE PREP

There are a few research steps you should take before starting to build your campaign.

1. Document your existing process. Before building a renewal campaign, you'll want to look at your current process. How does your team do member renewal right now, and where are the pain points?
2. Review member patterns and data. This step will be key to Step #3 where you build your campaign flow. Decide how many emails you will need to include in your campaign, how far apart they'll be spaced, and when members should exit the flow. Discover:
   - **a.** When do members normally pay?
   - **b.** Which emails that you've traditionally sent them have been effective?
   - **c.** What messages that you've sent them in the past have been effective?
   - **d.** What grace period do they currently expect?
3. Create a list of existing member benefits. Get your list together so you have it ready for the next section.

STEPS TO BUILD YOUR NEW AUTOMATED RENEWAL PROCESS

1. Create your email lists. You should have two lists: One list of members who haven't renewed, and one list of those who have.

2. Add your data to your campaign. There are two ways to do this:

a. Integrated: If your association management system (AMS) or CRM is integrated with your marketing automation software, use the integration to add the two lists into your software.

b. Not integrated: If you don't have an integration, upload your renewal list into your marketing automation software. You will want to build a reminder into your campaign to notify you to upload your most recent list of who has renewed before the decision step to send the next email. (This is so you don't send them an irrelevant email that they haven't renewed, when they actually have.)

3. Build your campaign flow. You'll use the cadence you determined in your prework, as well as your additional touchpoints and decision steps.

a. Add a decision step that removes anyone who has renewed before each email goes out.

b. Put your initial "needs to renew" list in as your send list.

c. Remember when you outlined your member benefits? Create an email promoting them, and send this email to everyone who is due for renewal as a way to warm them up.



4. Write your emails. Keep them short and focused on benefits to the member. Send your emails from a staff member's actual email address, not just name (i.e., "cheryl@association.org," not "membership@association.org"). Need messaging help? Check out these tips for writing better renewal messages.

5. Test your campaign. Use a different email address for each possible scenario in your campaign and make sure everyone flows through the way you expect them to. If there is no test mode in your software, you can make a copy of the campaign, shorten the wait periods, and try it on test email addresses (like your teammates).



6. Launch your campaign. Most systems will have several options for launch. For example, you might see these options:

a. Add subscribers over time. This will only add future subscribers and will keep adding them until it reaches an end date you set or you turn off the campaign.

b. Add subscribers at once. This will add subscribers who are currently in the list, and then stop. It will not add any future subscribers.

c. Add subscribers at once and over time. This will both add all existing subscribers and any who drop into the list them until it reaches an end date that you've set or you turn off the campaign.

d. Branch from another campaign. You would not choose lists for branch campaigns; they receive subscribers who reach a certain point in other campaigns and get dropped into this one.

7. Check on your campaign to see how it's doing. Here's what to look for: See how many people have come out of the campaign at each step. If you see very low results, e.g. only 3-5% have renewed, you may want to adjust your messaging. If you see that the first couple emails have encouraged a good number of renewals, you should let it keep running as-is.

TIP! Make sure all your different options have a testing email. For example, if you are removing members from the campaign when they renew, you will need to add someone's email address there to make sure they get removed.



BUILD IN HANDY REMINDERS

In Higher Logic's marketing automation software, you can set up notifications to remind yourself or other team members of activities outside of email. For example, let's say you want someone to make an extra renewal touchpoint via direct call, voicemail drop, or text to members who provide a cell phone number. Automatically remind the team and send them the list of who to contact with a built-in note in the campaign.

8. After 3 months have passed, see how your campaign has improved, stayed the same, or declined. If renewal success rates seem low or if you're not seeing improvements month-over-month, revisit your messaging and your cadence.

TIP! If this is a company level membership, double check that you're emailing the right contacts/people.

OPTIONAL STEPS

9. Show off your campaign! Report back to your stakeholders. How did automating this process go? Did you improve renewal, either in time saved for your team or on improved results on retention? This will help you show the value of the new process you've implemented.

10. Improve on the steps we provided. This campaign should be tailored to your members' preferences. Find something we didn't include that works? Add it to the mix.

The final step? Enjoy watching the results come in!



NOW WE'RE COOKING WITH GAS!

To make getting started easier, Higher Logic's marketing automation software includes some built-in campaign kits. These Starter Kits are built specifically for associations and include key campaigns you'd need.

Onboarding Campaign

Also known as a welcome campaign, an onboarding campaign is the perfect way to welcome new members into the association. Members receive a series of personalized emails, timed over few weeks to a year-long period, walking them through bite-sized benefits and opportunities to get involved in.

INGREDIENTS

- **Emails.** The number of emails in your campaign should be based on your unique audience and association. See the Pre-Recipe Prep section for more.
- **Data.** You will need a list of new members. The way you add your members will be different for those who have an integration and those who don't.

PRE-RECIPE PREP

1. Look at your current member benefits. Decide which of your member benefits are the best ones to highlight in the onboarding campaign. For example, maybe members love the online community, or certain trainings are very popular. Highlight these items in your campaign emails.

2. Decide on a cadence. How long should members wait before they get the next email in the flow? Add your preferred wait time. Do you want to notify someone on your team to make a personal call to members? Add a notification.

   Advanced version: *In the first email of your onboarding campaign, ask members why they joined. If you want to get sophisticated, you could add branch logic that sends them slightly more targeted content, based on their selected interests.*

3. Determine how many emails you'll need. A good starting point is 4-6 emails over the space of 2-3 months. Each email should focus on one member benefit, so the number of emails you send will vary by association. A smaller association with fewer benefits may have fewer emails to send – but you still want to have a cadence to remind members to get involved on a regular basis. Another association might have very detailed benefits, so you need to develop a "Year One" onboarding campaign that stretches throughout their first year.



STEPS TO BUILD YOUR YOUR ONBOARDING CAMPAIGN

1. Create your email list. This should be your list of new members.

2. Next, add your data to your campaign.

a. Optional: If your marketing automation system and database are integrated, the integration may be able to input new members into the campaign as soon as they join the association.

b. If you don't have an integration, you can also upload new members when they join – but don't make new members wait longer than a week to get their first onboarding email!

3. Build your campaign flow. You'll use the cadence you determined in your pre-steps, as well as any additional touchpoints (like a personal call to welcome a new member).

a. Consider what the progression of a new member looks like. What is the next logical step after they join? Once they make their first post in the online community, what should happen next?

4. Write your emails. Keep them short. You shouldn't tell the whole story in the email. Use a short, bulleted list that links to key pages on your website. Members' clicks on these links will help you know that they've read the emails and give you more insight into their interests. Additional tips:

a. Focus on one topic per email.
b. Send your emails from a staff member's actual email address vs. a "noreply" email address.
c. Focus on the benefit to the member and use member-centric language.
d. Include calls-to-action (CTAs).
e. Ask for feedback on their first month as a member (you could use a survey or ask them to reply to the email).

5. Test your campaign. Make sure everyone flows through the way you expect them to.

6. Launch your campaign! After you've tested, you're ready to launch with new members.

TIP! **You can use internal reminders here too! Let's say you get a lot of interest about your volunteer or mentoring programs during the onboarding campaign. You could notify the internal staff who want to grow their list of interested individuals, etc.**

TIP! **If you introduce new benefits, make sure you go back and include those in your onboarding campaign.**



7. Check on your campaign. You want to see high engagement in this campaign. Look for clicks on your desired CTAs rather than open rates, because open rates are increasingly unreliable.

8. Refine your campaign: After 3 months have passed, see how your campaign has improved, stayed the same, or declined. If you see a holding pattern on metrics, but they're fairly good (e.g. 30-50% click rate), don't make changes. But if clicks are low, re-evaluate.

Prospecting with Content Campaign

When you've set up this campaign, you'll have an effective new prospecting tool. We'll walk you through how to take a piece of content to attract new prospects and nurture them to completing your desired action. You could use the campaign for new member acquisition, event sponsorships, program sales – any type of sales situation.



INGREDIENTS

- **Piece of content.** Depending on the goal you've chosen for your campaign, choose a piece of content that you'll use as bait. It doesn't have to be something huge and labor-intensive to create! Let's say you're looking to attract event sponsors – maybe it's simply the sponsorship prospectus.

- **Landing Page.** Build a landing page where you describe your piece of content. Add a way to capture your visitors' information, like a form. This landing page should be integrated to your marketing automation software.

- **Emails.** Once your prospect has filled out the form to access the piece of content, your goal is to nurture them toward the desired action. Continuing with the sponsorship example, you would ideally have a series of 3-4 emails that describes all the benefits of being a sponsor.

PRE-RECIPE PREP

1. **Determine how you'll qualify your data.** The goal here is to make sure you're sending your campaign to the right people. This also is important if you have a sales team. You want to make sure they're spending their time pursuing the right leads. For example, maybe someone filled out your form but they're not a real company. They shouldn't receive this campaign. To qualify your data, you can set up automations that check off boxes on a list you create. For example, "Check if this is a real company." "Check if they're already in our database." "Check if they filled out their corporate categories." "Check if they're in the middle of another campaign." All these steps will help you make sure your data is nice and clean and ready for prospect nurturing.

2. **Decide on a cadence.** When you're thinking about your cadence, don't forget to think through your qualification steps, the wait times between each email, decision steps (e.g. did your prospect decide they want to be a sponsor? They don't need to receive the campaign anymore) and how many emails you want to send.

STEPS

1. Decide on the topic. Choose a goal for your campaign and a corresponding piece of content.

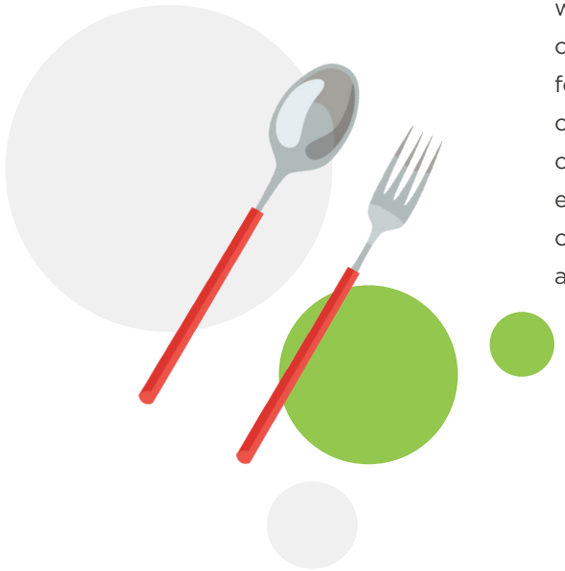
2. Build your landing page. Describe the piece of content you're offering and add a way to capture their contact information. If you're using a form, ask for the data you'll need to send the campaign.

3. Identify your list. Your list will come from the people who give you their email address on the landing page. When you first set up your campaign, you probably won't have anyone in that email list, since you haven't promoted the landing page yet. But once someone fills out the form on the landing page, you'll be ready for them! You'll also need your qualification lists.



4. Map out qualification process. You know those qualification steps you decided on in the prepwork? Now you need to think through what order you need those steps to go in. For example, you might need to know if they're in your database or not before you ask the system to check if they've filled out their corporate categories.

TIP! **Keep in mind that a separate set of needs should have a separate campaign. For example, you might want to nurture members to attend your event and companies to sponsor your event – this requires two separate campaigns.**



5. Write your emails. Shorter emails are better. If you have other pieces of content to help make your case to the prospect, add those into the flow as well. For example, if your goal is to gain new members, promote your top member benefits, like your online community or your certification programs.

6. Create your campaign. Build the cadence you planned out in your prework, and then add your emails.

7. Test your campaign. Make sure everyone flows through the way you expect them to.

8. Launch your campaign! After you've tested, you're ready to launch your new prospecting campaign.

9. Check on your campaign. Are you seeing an effect on your goal? There are a lot of areas you can tweak or change to see if it works. You could try a different piece of content or different promotion strategies for your landing page. Watch how your campaign recipients are clicking (or not clicking) through your emails. Do they stay engaged up to a certain point, then it drops off? Consider revising that email. It's all about testing!

Event Support Campaign

You've got an event coming up – nurturing your potential attendees is an excellent strategy to increase attendance. This campaign can work with many types of events – in-person, virtual, or hybrid.



INGREDIENTS

- **Your emails.** You'll have a better sense of messaging for these emails after you to do your pre-recipe prep.
- **A list of known users interested in your event.** This campaign comes with a twist – we learn how to use web tracking! See more in pre-recipe prep.

PRE-RECIPE PREP

1. **Create a list of justifications for why people should attend.** Think about common reasons members might attend your event, look to post-event feedback from past years, and consider what makes your event unique. This might include things like education, the online event community, networking, the exhibit hall – these will inform your messaging and your campaign emails.

2. **Set up web tracking** on the event pages on your website, especially your registration page. Web tracking lets you know who visits your event page so that you can target them with specific communications about your event.

3. **Send out an email about your event to a broad group.** When people click on the event page from your email, they will now be a known user (thanks to web tracking and your email links working in tandem), and you'll know when they visit your registration page. This is how you create your email list for your event campaign.

STEPS

1. Create your campaign flow. Base your number of emails on the justifications you figured out in the prepwork. Follow these tips:

a. Limit yourself to one justification to attend per email.

b. Add a decision step to remove anyone who has registered before you send each email. This makes sure communications stay relevant.

c. You could include one email that describes all the logistics for the event at the end of the flow and even provide a justification letter.

2. Set up a mute campaign. You might end up with people in your campaign who know they can't attend your event, for whatever reason. Adding a mute campaign gives them a way to opt out of those specific emails and gives them more control over their preferences (for example, maybe they want to hear about your events, but just not this one).

3. Add your lists. You will need a list of those who have already registered to exclude from your email and a list of interested parties (the list provided through web tracking).

4. Write your emails. Keep your emails limited to one reason to attend per email. Write about the benefits for the member.

5. Test your flow. Test every scenario with different email address that fits that scenario.

6. Launch your campaign. After you've launched, one important thing to keep in mind for event campaigns is the end date. You want the campaign to stop accepting new emails at a certain point. You can keep the campaign running right up until the conference, but you should also make a note to turn the campaign off completely once the event is finished. Why? Even if the campaign has passed the end date, it will still finish out the sequence it had already started unless you turn it off.

7. Report on results! How did your campaign affect registration and even attendance? The British Columbia Non-Profit Housing Association **used a campaign strategy** and increased attendance at a virtual event by nearly 50%. If your campaign did well, make sure to share your results with your team and the broader organization.



Community Engagement Campaign

When you have an online community, using an automated campaign can be super effective for engagement. It's a great way to get members to join the community, fill out their profiles, get active, attend events, and more.

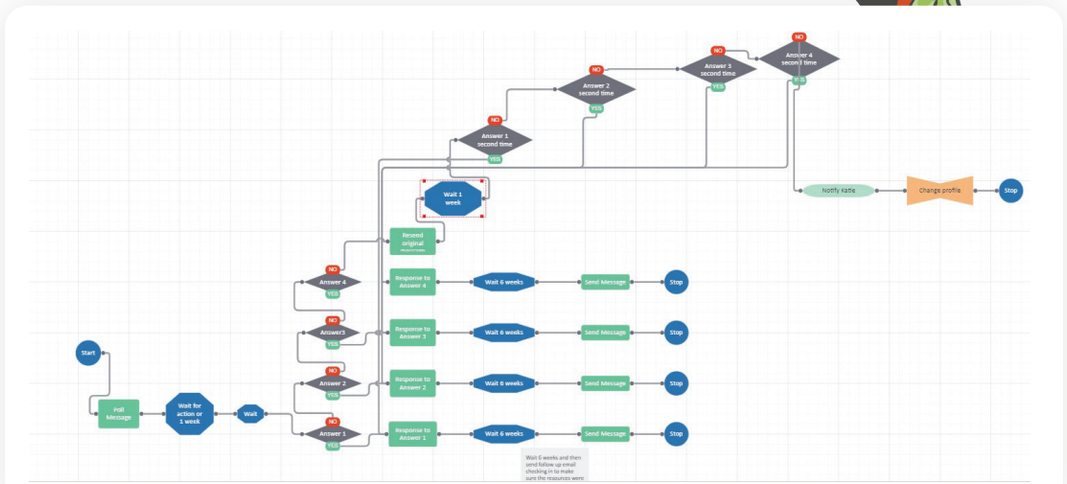
We focused this specific community engagement campaign on targeting members' interests. The first email asks about their interests and tailors the rest of the campaign.



THIS IS HOW IT WORKS:

- Send an email to your members with a poll asking them what they're most interested in. Stick with 3-5 options.
- Add a wait step of one week to give them time to answer.
- Create a follow-up email for each of your topics – for example, if they chose mentorship, send them an email with resources on mentorship in the community.
- After adding a wait step (we recommend 6 weeks), send another email to ask if the resources were helpful.
- For those who don't respond, send them down an alternate path where they receive every follow-up email, every week.





NOW THAT YOU'VE GOT THE GIST, LET'S GET COOKING!

INGREDIENTS

- **Your email list.** The audience for your campaign is up to you – you could include disengaged members in the online community or members who have newly joined the online community.
- **Your emails.** The key emails in the campaign will be the initial poll email, the follow-up emails on specific topics, and the final follow-up asking how they have been enjoying the community.

PRE-RECIPE PREP

Choose your poll options. Think through not only what the poll options should be, but also which resources you'll showcase in each follow up email. For example, if they say they're interested in mentoring, which mentoring resources will you send?

STEPS TO BUILD YOUR COMMUNITY ENGAGEMENT CAMPAIGN

1. **Add your data to your campaign.**
   a. Optional: If your marketing automation system and your online community are integrated, you can continuously add members to the campaign.
   b. If you don't have an integration, you can also upload your community members directly to the campaign.

2. Build your campaign flow. Feel free to use the cadence we outlined above or build your own!

3. Write your emails. Keep them short. You shouldn't tell the whole story in the email. Use a short, bulleted list that links to key pages in your online community. Clicks on these links will help you know that they've read the emails and give you more insight into whether your emails are working. Additional tips:

a. Focus on the benefit to the member and use member-centric language.

b. This email campaign works best if you send it from your community manager, or in place of a community manager, the staff person best known in the community.

4. Test your campaign. Make sure everyone flows through the way you expect them to.

5. Launch your campaign! After you've tested, you're ready to launch with your community members.

6. Check on your campaign. Have these emails led to the desired action and/or higher engagement in the community? If not, consider refining your messaging or having the community manager reach out to a few members to get their feedback about why they're not engaging or why they didn't respond to the emails.



Internal Campaign

There are lots of manual processes around your organization that you can automate. The "internal campaign" is all about finding ways to show the value of your marketing automation software across your organization. Here are a few examples of things you could automate:

- Staff birthday emails
- Emailing invoices
- Qualifying sales leads who download resources

If you want practice creating campaigns, an internal campaign is a great place to start.

INGREDIENTS

- **A coworker** with a problem that you can solve!

PRE-RECIPE PREP

- **Ask questions.** Talk to your coworkers and identify a process you can streamline using automation.
- **Create campaign components.** Based on the problem, identify the components of your campaign. You know you'll need an email list, but beyond that, consider whether you'll need additional content or landing pages. You'll also need email copy, so get your internal team started on some messaging bullet points you can use in your emails.

STEPS

1. Set up your campaign flow in your marketing automation tool. Identify the decision steps you'll need before each email.

2. Add the email lists you prepared.

3. Write your emails using the messaging your team provided. Get their thoughts on the final messaging. Then, add your emails into the campaign.

4. Test your campaign with your coworker. Make sure the emails are delivering or not delivering as planned.

5. Launch your campaign!

6. Check on your campaign. If the campaign isn't working like you hoped, refine it.



Let Higher Logic Be Your Sous Chef

It takes time to build a marketing automation campaign. But, once you've built your campaign, you've done the hardest part. And you can watch the results flow in! For example, the British Columbia Non-Profit Housing Association (BCNPHA) built an event campaign using Higher Logic's **Starter Kits** and **increased registration for their virtual event by 50%.**

LET'S CONNECT




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