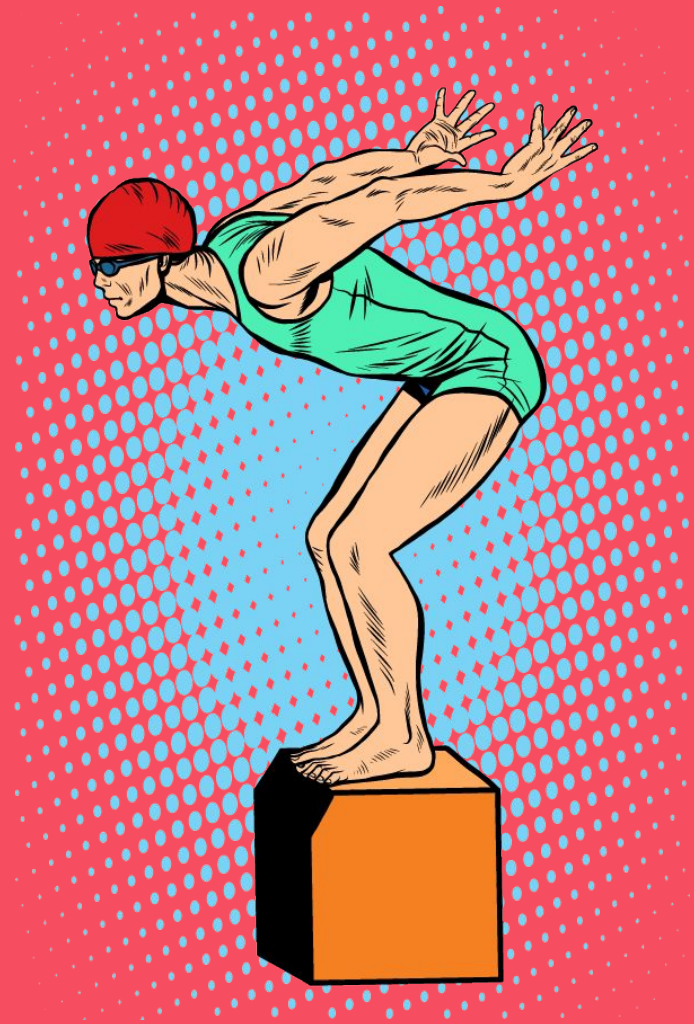# Marketing automation & personalisation

View in browser

BROOKS   **Women**   **Men**

Get the perfect fit for your feet.

You deserve a perfect fit. That's why many of our shoes
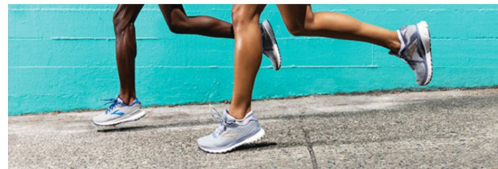are available in narrow, wide and extra wide widths.

Glycerin 18

CUSHION

The ultimate in softness and supreme comfort is also
available in wide widths.

Shop men   **Shop women**

UNSUBSCRIBE

What do they know about me?

Name

Address

Gender

Shoe size and width

Foot arch type

Type of shoe preference

Date I last bought shoes

Subscription status

Ryan, your size is on sale!

View in browser

BROOKS   Women   Men

Ge**Time for new shoes**et.

Did you know that if you're running daily, you should replace are availa your shoes every three months? de widths.

You deserve a perfect fit. So we've got your size on sale this week.

Glycerin 18
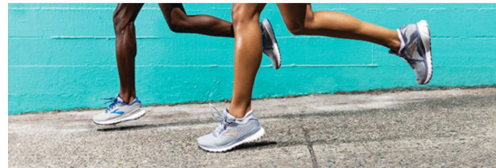
CUSHION

You might like to try the new Glycerin, its our new neutral cushioning shoe.

Shop men	Shop women

If I unsubscribe...

- Put me in an Unsubscribe ad audience for Facebook, Google, LinkedIn
- Move between audiences based on time since last order
- Target ads to incentivise new order/subscription
- Win back subscription on new order
- Consider SMS with opt out

If I buy...

- Put me in an exclusion ad audience for Facebook, Google, LinkedIn for ~3 months
- Move between audiences based on time since last order
- Send new email for new models that suit my fit and preference
- Send new email to remind me to replace my daggy shoes
- Send new email if my shoes are in stock or on sale

What is marketing automation?

Right message
Right person
Right time

What is marketing automation?

Deliver the right message, to the right person, at the right time.

- Automate campaign actions and follow ups based on actions people take.
- Personalise and contextualise communication at scale.
- Helps small marketing teams deliver big impacts.
- Doesn't replace humans, but allows you to focus the personal touch where it's most valuable.

Why marketing automation?

Deliver the right message, to the right person, at the right time.

You can't perform every action manually. It's not:

- Realistic
- Financially viable
- Timely

Old fashioned bulk email isn't going to cut it.

What can we do with marketing automation?

All the basics...

- Send emails
- Send SMS
- Add people to ad audiences
- Connect on LinkedIn
- Register people for events
- Assign leads
- Send notifications

What can we do with marketing automation?

With the basics we can personalise!

- Merge tags
- Customised send times
- Contextualise content to actions people have taken
- Get feedback when it's relevant
- Improve the customer experience
- Improve relevancy of communications

Personalised content

Show the right content to the right people

Use smart content to control display

- Display different paragraphs of text or CTAs based on list membership

Display in a range of locations

- Landing pages
- Email copy
- Web pages
- Call To Actions

WHY?

So...

- people engage with our marketing
- our content is relevant to the people we're targeting
- We're providing a great customer experience

Which means...

- Improved open rates
- Improved click through rates
- Improved conversion rates
- Improved ad spend efficiency
- Improved ROAS
- Improved visibility over results

Get your tech stack right from the outset

Start with an audit

What are you currently using?

- Create a list
- This tells you what integrations you need

Map your customer journeys

What do you need to automate?

- What are your current marketing journeys?
- How can we use automation to improve them?
- How can we use automation to personalise them?
- What 'surprise and delight' elements would we love to add?

Start with the CRM

Look for:

- Integrations with other tools you use
- Off the shelf integrations with tools you want to use in the future
- Value for money
- As few moving parts as possible

HubSpot

salesforce

ActiveCampaign

mailchimp

keap

shopify

Marketing automation tool

Look for:

- Integrations with other tools you use
- Off the shelf integrations with tools you want to use in the future
- Value for money
- Ease of use
- Training materials

HubSpot

ActiveCampaign

mailchimp

keap

KLAVIYO

Our tech stack

The simplified version...

HubSpot at centre

- Stores all stakeholder information
- Directs marketing automation
- Tracks ROI

Sakari - SMS

Cradle - Phones

Stripe - Credit card payments

Seventh Sense - Email send time optimisation

Facebook, Google, LinkedIn - Audiences & conversion events

23 & Wistia - Video hosting & analytics

Zoom - Video calling

Google Workspace - Email and documents

Typeform - Forms and surveys

Slack - Chat & notifications

Why HubSpot?

The platform that makes it possible for everyone to afford a decent CRM

Solution at any price point

- Free and up

Ease of integration

- Connects to nearly anything out of the box, avoiding custom integrations

Ease of use & training
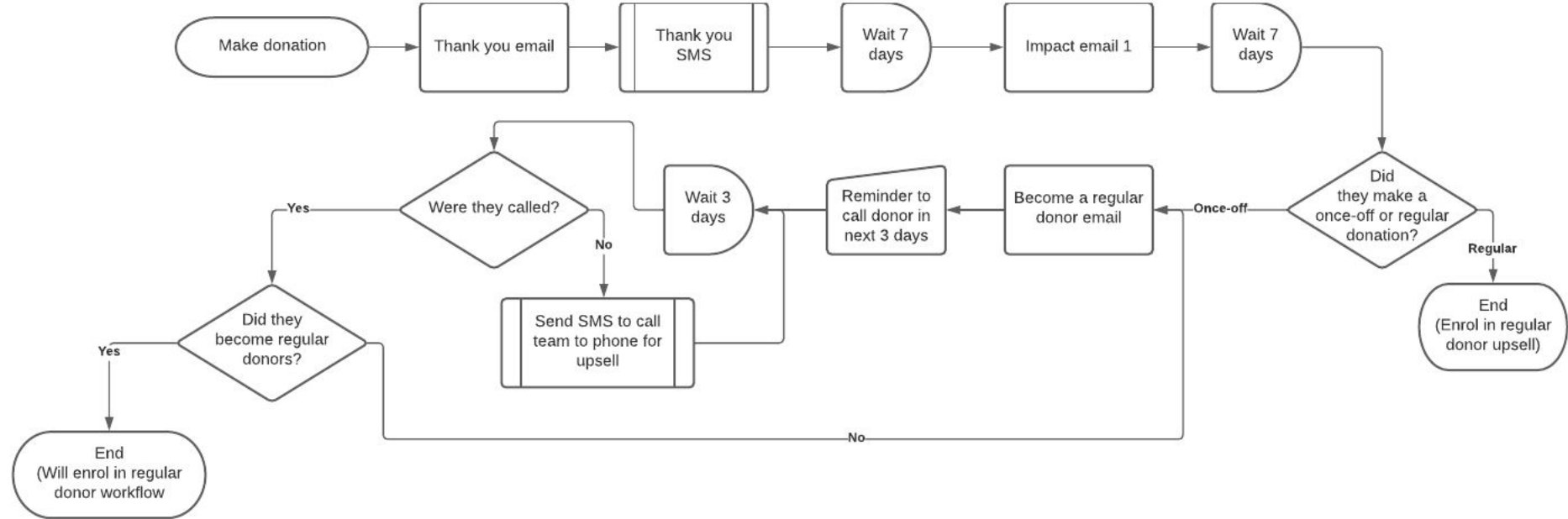
- HubSpot Academy
- Online tutorials

Range of uses

- Marketing
- Sales/Donations
- Service & support
- Website/CMS

All in one

- Less moving parts, subscription fees & logins

Bringing it together

```
Make donation → Thank you email → Thank you SMS → Wait 7 days → Impact email 1 → Wait 7 days
                                                                                      ↓
                                                                        Did they make a once-off or regular donation?
                                                                        → Regular → End (Enrol in regular donor upsell)
                                                                        → Once-off →
Become a regular donor email ← (Once-off)
→ Reminder to call donor in next 3 days → Wait 3 days → Were they called?
  → Yes → Did they become regular donors?
          → Yes → End (Will enrol in regular donor workflow
          → No →
  → No → Send SMS to call team to phone for upsell
```

Benefits of this approach

- Personalising content for different trades
- Tailoring ad messaging to different stages of the buying process
- Personalising email send times
- Complete ROI measurement in one place
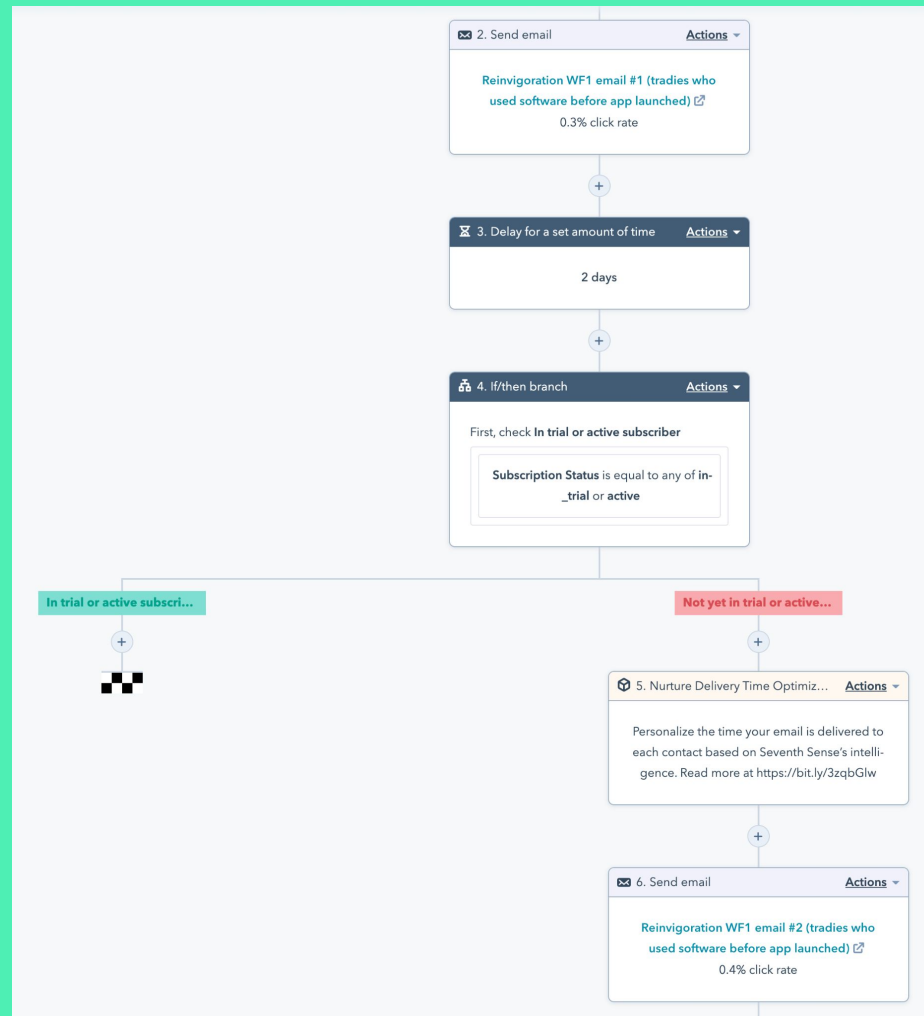- Linking meetings, sales approach & touch points to conversions

2. Send email — Actions ▾

Reinvigoration WF1 email #1 (tradies who used software before app launched) ↗
0.3% click rate

＋

3. Delay for a set amount of time — Actions ▾

2 days

＋

4. If/then branch — Actions ▾

First, check **In trial or active subscriber**

Subscription Status is equal to any of **in_trial** or **active**

In trial or active subscri...   Not yet in trial or active...

＋   ＋

5. Nurture Delivery Time Optimiz... — Actions ▾

Personalize the time your email is delivered to each contact based on Seventh Sense's intelligence. Read more at https://bit.ly/3zqbGlw

＋

6. Send email — Actions ▾

Reinvigoration WF1 email #2 (tradies who used software before app launched) ↗
0.4% click rate

Results

633% increase in deals created

256% increase in deals closed

Re-engaging dormant subscribers

Visibility over ROI of each channel, allowing efficient growth

Key takeaways

- Technology is relatively easy now, focus on the journeys
- Get the right tech stack from the outset
- Doesn't have to be expensive, and ROI can be huge
- Doesn't do everything for you

refuel

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Questions?
Get in touch