



Constant Contact & Email Best Practices

Email Marketing Platform



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“By failing to prepare, you are preparing to fail.”

Benjamin Franklin



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Agenda

Things We'll Cover

Communication Strategy

- Novi groups
- List management and data clean up
- Email marketing best practices

Let's Build

- Drip campaign from scratch

Open Discussion

- Share your campaigns and ideas





Communication Strategy

Novi Group Conditions



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Novi Groups

Novi Groups are a powerful way to segment your data by certain commonalities and can benefit different departments of your association.

- Member type (*Marketing*)
- Member status (*Sales*)
- Member fields (*Accounting*)
- Geographics (*Events & Advocacy*)
- Custom fields (*Database Management*)
- Engagement (*Education*)
- Specific records (*Leadership*)





Novi Groups

New Member Onboarding

Welcome new members with a personalized onboarding campaign.

*Name: New Member Onboarding

Category: Constant Contact

Limit to Specific Records: OFF

Conditions

[AND] [OR]

+ ADD RULE + ADD GROUP

Member Type	equal	Individual Member	Delete
Membership Status	equal	Current	Delete

TIP: Engage your members with a video onboarding series.





Novi Groups

New Inheriting Member Onboarding

Explain membership benefits to new people that join a company membership.

*Name Category

Limit to Specific Records OFF

Conditions

[AND] [OR] + ADD RULE + ADD GROUP

Parent Member Type	equal	Supplier Member	Delete
Membership Status	equal	Inheriting	Delete

TIP: Personalize the subject line with their name.





Novi Groups

Email Marketing Preferences

Allow your members to opt-in to the communication they want to receive.

*Name Category

Limit to Specific Records OFF

Conditions

[AND] + ADD RULE + ADD GROUP

⋮ Email Marketing Preferences contains Events Delete

TIP: Allow members to opt-in and respect their answer!





Novi Groups

Has User Account, Never Logged In

Encourage your members to log in for the first time to set up their profile.

*Name Category

Limit to Specific Records OFF

Conditions

[AND] [OR] + ADD RULE + ADD GROUP

Has a User Account	equal	<input checked="" type="radio"/> Yes <input type="radio"/> No	Delete
Last Login - Days Ago	is null		Delete

TIP: Let them know how easy it is to register for upcoming events.





Novi Groups

Active Members Not Signed Up for Auto-Pay

Learn which members aren't setup for Auto-Pay to remind them they can.

*Name Category

Limit to Specific Records OFF

Conditions

[AND] [OR]

+ ADD RULE + ADD GROUP

Member Type	equal	Supplier Member	Delete
Membership Status	equal	Current	Delete
Auto-Pay	equal	<input type="radio"/> Yes <input checked="" type="radio"/> No	Delete

TIP: Provide a discount for your Auto-Pay members.





Novi Groups

Blank Custom Field

Let your members know that you're missing vital information from them.

*Name Category

Limit to Specific Records OFF

Conditions

[AND] [OR] + ADD RULE + ADD GROUP

Favorite Disney Character is null Delete

[AND] [OR] + ADD RULE + ADD GROUP X Delete

Membership Status equal Current Delete

Membership Status equal Inheriting Delete

TIP: They can update this through their Member Compass.





Novi Groups

Members Expiring in 90 Days

Start your renewal campaign before sending them an invoice.

*Name Category

Limit to Specific Records OFF

Conditions

[AND] [OR] + ADD RULE + ADD GROUP

Membership Expiration - Days Ago	greater or equal	-90	Delete
Membership Expiration - Days Ago	less or equal	0	Delete

TIP: You can set up a reverse condition for overdue dues.





Communication Strategy

AND vs OR Conditions



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Novi Groups

AND vs OR Conditions

When dealing with AND & OR conditions, always start with the larger segment.

*Name: Category:

Limit to Specific Records OFF

Conditions

[AND] [OR] + ADD RULE + ADD GROUP

Member Type equal Supplier Member Delete

[AND] [OR] + ADD RULE + ADD GROUP X Delete

Shipping City equal Orlando Delete

Shipping City equal Jacksonville Delete





Novi Groups

AND vs OR Conditions

*Name

Category

Limit to Specific Records OFF



Conditions

[AND] [OR] + ADD RULE + ADD GROUP

- Shipping City equal Orlando [Delete](#)
- Shipping City equal Jacksonville [Delete](#)
- [AND] + ADD RULE + ADD GROUP [Delete](#)
 - Member Type equal Supplier Member [Delete](#)





Novi Groups

AND vs OR Conditions

*Name: Category:

Limit to Specific Records OFF



Conditions

[AND] [OR] + ADD RULE + ADD GROUP

Member Type equal Supplier Member Delete

[AND] [OR] + ADD RULE + ADD GROUP X Delete

Shipping City equal Orlando Delete

Shipping City equal Jacksonville Delete





Communication Strategy

Group Beneficiaries



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Novi Groups

Group Beneficiaries

When setting up a Group, choose how your group benefits will flow based on the entity's relationship with the primary group member.

Group Beneficiaries

Extend group benefits based on an entity's relationship with the group member

- Group members only
- Group members & family members inheriting membership benefits
- Group members & custom family members





Novi Groups

Group Beneficiaries

Example: You wanted to set up a group that extends group benefits to anyone that is receiving or "inheriting" membership benefits.

Conditions

[AND] [OR]

+ ADD RULE + ADD GROUP

⋮	Member Type	equal	Supplier Member	Delete
⋮	Membership Status	equal	Current	Delete

AE Tip™

Group Beneficiaries

Extend group benefits based on an entity's relationship with the group member

- Group members only
- Group members & family members inheriting membership benefits
- Group members & custom family members





Email Sync Status

What Does it Mean?



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Novi Groups

Email Sync - Status & Errors

Once a group is synced to Constant Contact, you'll have visibility of the **overall status**:

- N/A: No sync attempted
- Up to Date: The sync was successful
- Red Error: The sync was unsuccessful

NAME ▲	CATEGORY	# OF MEMBERS	# OF BENEFICIARIES	# OF MEMBERS AND BENEFICIARIES	CONSTANT CONTACT
Active Members Not Signed Up for Auto-Pay	Constant Contact	156	0	156	Up To Date (3/1/2023 4:12 AM)
Blank Custom Field	Constant Contact	66	0	66	Up To Date (3/1/2023 4:22 AM)



TIP: Syncs typically don't account for bounce backs or unsubscribes.





Novi Groups

Email Sync - Status & Errors

N/A: Novi didn't attempt to sync the record, for a variety reasons:

- This member lacks an email address.
- Another member is using the same email address.
- The group does not sync primary and/or beneficiary member emails.
- The member has elected to not receive marketing emails.





Novi Groups

Email Sync - Status & Errors

Red Error can be a bit broader since many of the errors we show you via the groups come directly from Constant Contact.

Examples:

- The email has unsubscribed, bounced, or has compliance issues
- The list was deleted in Constant Contact

Olivia Greene <i>The Greene Co.</i>		Primary Group Member	
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TIP: Hovering over the “!” icon will give you the reason for the error.





List Management

Segmenting Your Contacts



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List Management



List Hygiene

Performing regular “list cleanings” will boost your sender reputation and increase the chances that your emails actually make it to your subscribers inbox.

- Remove duplicate contacts
- Update invalid email addresses
- Verify contact information
- Manage **soft** and **hard** bounces



List Management



Contact Engagement

The days of sending a giant, generic email blast or newsletter to everyone in your database are long gone. Your contacts want to receive content that's relevant to them!

- Get their permission
- Ask what they want to receive
- Segment your target audience
- Utilize **dynamic content** that's relevant to them





Data Clean Up

Non-Engaged Contacts



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Data Clean Up

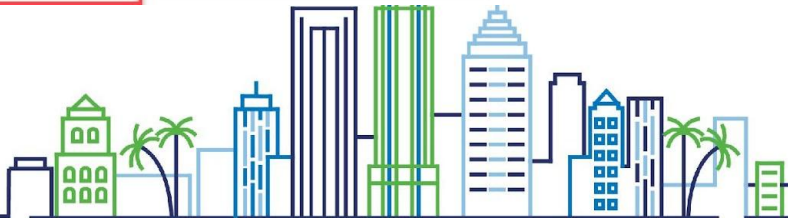
The Purge

Create a regular schedule to **re-engage or clean up unengaged email addresses**. If they aren't engaging with your emails, they're actually hurting your sender reputation.

Pre-built segments

Send targeted emails to everyone with these pre-built segments. Create a new email or copy an existing one in just a few clicks. [Learn more about segments](#)

<p>Most engaged</p> <p>Contacts who regularly open and click your emails.</p> <p>Send an email ...</p>	<p>Somewhat engaged</p> <p>Contacts who sometimes open and click your emails.</p> <p>Send an email ...</p>	<p>Least engaged</p> <p>Contacts who rarely open and click your emails.</p> <p>Send an email ...</p>	<p>Everyone else</p> <p>Remaining contacts who received too few emails to measure engagement.</p> <p>Send an email ...</p>
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Data Clean Up

Unsubscribed Contacts

Make sure you have the “Include unsubscribe comment box” option enabled to collect information as to why your contacts are unsubscribing.

Footer settings

Include an “Update your profile” link in footer

Off

Include “Unsubscribe” comment box

On



Data Clean Up



Unsubscribed Contacts

If a contact unsubscribes they are considered “inactive” and will not count towards your billable number of contacts.

What to do with unsubscribed contacts?

1. Figure out why they are unsubscribing
2. Reconfirm their interest (opt-in email)
3. Leave them in your account
4. Export them from your account





Email Marketing Best Practices

Improve Your Sender Score



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Email Marketing Best Practices

Group Segments

Now that you've created and setup your segmentations, make sure you're **using them** in your email marketing campaigns.

<input type="checkbox"/>	★	List name ↑	Contacts	Date created	
<input type="checkbox"/>	☆	Active Members Not Signed Up for Auto-Pay	62	Feb 28, 2023	...
<input type="checkbox"/>	☆	Blank Custom Field	53	Feb 28, 2023	...
<input type="checkbox"/>	☆	Email Marketing Preferences: Events	2	Feb 28, 2023	...
<input type="checkbox"/>	☆	Has User Account, Never Logged In	85	Feb 28, 2023	...





Email Marketing Best Practices

What Analytics Should You Track?

To gauge your email marketing efforts, you'll need to keep track of a few different email metrics.

Which metrics you measure will **depend on your goals**:

- Open Rate
- Click Rate
- Unsubscribe Rate
- Conversion Rate



Email Marketing Best Practices



The Curiosity Gap

Is there a need for your members to engage with your emails? By creating a curiosity gap, you're teasing your reader with a hint of what's to come, without giving all the answers away.

- Personalized content
- Make good use of the subject line
- Keep it short and skimmable
- Include one call-to-action in multiple places
- Give them a reason to engage



Email Marketing Best Practices



Best Time to Send an Email

Your contacts and segmented lists are **unique**.

Review your **send history** and **open rate reporting** to determine the best time to send your emails.

1. Look at your trends
2. Think about your audience
3. Think about your campaign
4. A/B test your emails



Email Marketing Best Practices



Open Rate Report

5 Items

Opened ▾

Unique Opens ▾

🔍 Filter by email address or name

<input type="checkbox"/>	Email Address	First Name	Last Name	Date/Time	
<input type="checkbox"/>	leigh.grammer@gmail.com	Leigh	Grammer	Tue, Aug 28, 2018 at 4:59 PM EDT	...
<input type="checkbox"/>	r.richards@outlook.com	Ricky	Richards	Tue, Aug 28, 2018 at 4:45 PM EDT	...
<input type="checkbox"/>	marymarsh01@gmail.com	Mary	Marshall	Tue, Aug 28, 2018 at 4:22 PM EDT	...
<input type="checkbox"/>	jjohnson89@yahoo.com	Jerry	Johnson	Tue, Aug 28, 2018 at 4:19 PM EDT	...
<input type="checkbox"/>	will.williams@aol.com	Bill	Williams	Tue, Aug 28, 2018 at 4:19 PM EDT	...





Email Marketing Best Practices

Reporting



Emails Contacts Ecommerce

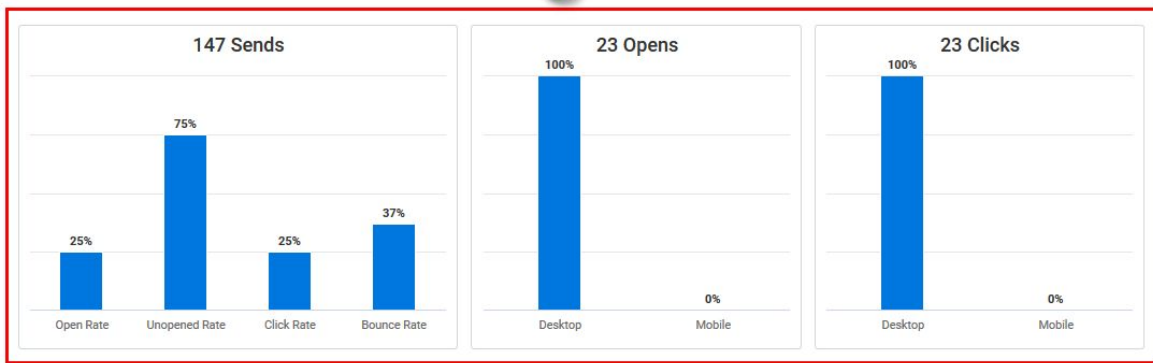
Past 12 Months Click rate ⓘ

Overview

A look at some of your top emailing stats during this time.



Download As ▾





Email Marketing Best Practices

Trends

Check out how your numbers compare over time.

5

Your open rate:	25%	Your click rate:	25%
vs. previous 12 months	+8% ▲	vs. previous 12 months	+10% ▲
vs. industry average	+10% ▲	vs. industry average	+25% ▲

Improve open rates

Pique subscribers' interest by making an announcement.
Example: "Announcing our new fall fashions."



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Improve click rates

Improve your click rate by segmenting your list and sending more relevant content to each segment. [Learn how.](#)



← Previous Next →

6





Best Time to Send an Email

If you're not sure where to start, these proven days/times might help:

Days of the Week

Tuesday, Wednesday, Thursday

Times of the Day

6:00am, 10:00am, 2:00pm, 8:00pm





Email Marketing Best Practices

Update Your Footer

If you're tracking email preferences as a custom field, think about replacing the default "Update your profile" Constant Contact link in the footer of your emails with a link to your Member Compass.

Footer settings

Include an "Update your profile" link in footer

Off



Include "Unsubscribe" comment box

On



Email Marketing Best Practices



Want to Change How You Receive These Emails?

[Login to your Member Compass](#) to update your preferences.

Novi AMS | 13506 Summerport Village Parkway, Suite 805, Windermere, FL 34786

[Unsubscribe](#)

[Constant Contact Data Notice](#)

TIP: Use “example.com/member-compass#profile”



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Let's Build!

Automated Drip Campaign



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What Are You Working On?

What Do You Want to Create?



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Additional Resources

Never Stop Learning

- From other association professionals and Novi customers
 - Novi Exchange & Roundtables
- Email Marketing Best Practices
 - <https://www.constantcontact.com/blog/email-marketing-best-practices/>
- Boost Your Click-Through Rates
 - <https://www.constantcontact.com/blog/boost-email-click-through-rates/>
- Email Deliverability: Why Emails Go to Spam
 - <https://www.constantcontact.com/blog/what-is-email-deliverability/>



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