



Email Best Practices & Mailchimp

Email Marketing Platform



SUMMIT

Presented by

NOVI AMS

Digital Mettle

Sponsor Introduction



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

Benjamin Franklin



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Agenda

Things We'll Cover

- Preparing your communication strategy
 - Novi Groups | List management | Data clean up | Email marketing best practices
- Let's build! Building a drip campaign from scratch
- Open discussion
 - Share your campaigns & 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*)
- Open or overdue balance (*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

Category

New Member Onboarding

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 an existing company membership.

*Name

Category

New Inheriting Member Onboarding

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 first name.





Novi Groups

Email Marketing Preferences

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

*Name

Email Marketing Preferences: Events

Category

Limit to Specific Records

☐

OFF

Conditions

[AND]

Email Marketing Preferences

contains

Events

Delete

+ ADD RULE

+ ADD GROUP



TIP: Allow members to opt-in and then 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

Has User Account, Never Logged In

Category

Limit to Specific Records

☐

OFF

Conditions

[AND] [OR]

+ ADD RULE + ADD GROUP

Has a User Account

equal

☒ Yes ☐ 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

Active Members Not Signed Up for Auto-Pay

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

☐ Yes ☒ 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: Blank Custom Field 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 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

Members Expiring in 90 Days

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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AND vs OR Conditions

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

*Name: Members in Orlando or Jacksonville
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 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.

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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Email Sync - Status & Errors

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

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

MEMBER ▲	TYPE	GROUP MEMBER STATUS	DO NOT SEND MARKETING EMAILS	MAILCHIMP SYNC STATUS	EMAIL
100% Chef <i>Bluestar, Inc.</i>		Primary Group Member		Up To Date (2/13/2023 3:05 PM)	contact@chef.com
123 Simplicity Co.		Primary Group Member		N/A	
18 Watercrest <i>Angel Management</i>		Primary Group Member			18wc@example.com

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 Mailchimp.

Examples:

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

TIP: Hovering over the “!” icon will give you the reason for the error.





List Management

Data Clean Up



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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.

- Update invalid email addresses
 - Go through auto-responses, & hard and soft bounces
- Verify contact information
 - When a member calls in, ask to verify their contact info while you have them
- Delete unused or old lists & groups
 - It is OKAY to **delete lists** from Mailchimp, data in Novi won't be impacted



List Management

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 news about
- Utilize **dynamic content** to only show them relevant information



Data Clean Up

The Purge



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

Start with a pre-built segment

New Subscribers

Make a great first impression. Send a campaign to subscribers who signed up for your emails in the past 7 days.

Active Subscribers

Drive conversions by targeting subscribers who have opened at least 1 of your last 5 campaigns.

Inactive Subscribers

Reconnect with inactive subscribers who haven't opened your last 5 campaigns.



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Try it. Learn from it. Improve it.

Tips for Best Practices



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Email Segmentation

Mailchimp Segments

Now that you've created and setup your segmentations, make sure you're **using them** on the Mailchimp side!

✓ To
Who are you sending this campaign to?

Audience
Novi AMS

Segment or Tag
Group or new segment

New Segment Paste Emails Update Recipient Count

Contacts match any of the following conditions:

Novi AMS Interests one of

- Members coming up for renewal (within 90 days)
- New Member Onboarding
- Email Preferences: Advocacy
- Expired Members
- Members coming up for renewal (within 90 days) - 1





What Analytics Should You Track?

To gauge your email marketing efforts, you'll might want 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.

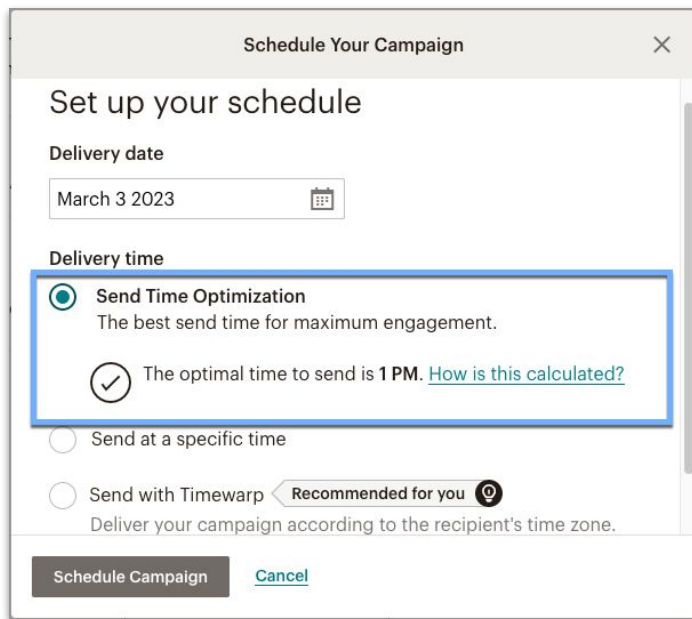
- Personalized content
- Make good use of the subject line
- Keep it short and skimmable
- Include one call-to-action in multiple places



Email Marketing Best Practices

Mailchimp's Send Time Optimization

Reach your audience when they're most likely to engage.



The image shows a 'Schedule Your Campaign' dialog box from Mailchimp. It has a title bar with a close button (X). The main heading is 'Set up your schedule'. Under 'Delivery date', there is a text field showing 'March 3 2023' and a calendar icon. Under 'Delivery time', there are three radio button options. The first option, 'Send Time Optimization', is selected and highlighted with a blue border; it includes the text 'The best send time for maximum engagement.' The second option, 'The optimal time to send is 1 PM. [How is this calculated?](#)', is also visible. The third option is 'Send at a specific time'. Below these is an option 'Send with Timewarp' which is marked as 'Recommended for you' with a badge and includes the text 'Deliver your campaign according to the recipient's time zone.' At the bottom, there are two buttons: 'Schedule Campaign' and 'Cancel'.

Schedule Your Campaign

Set up your schedule

Delivery date

March 3 2023

Delivery time

☒ Send Time Optimization
The best send time for maximum engagement.

☐ The optimal time to send is 1 PM. [How is this calculated?](#)

☐ Send at a specific time

☐ Send with Timewarp **Recommended for you**
Deliver your campaign according to the recipient's time zone.

Schedule Campaign Cancel





Email Marketing Best Practices

Update Your Footer

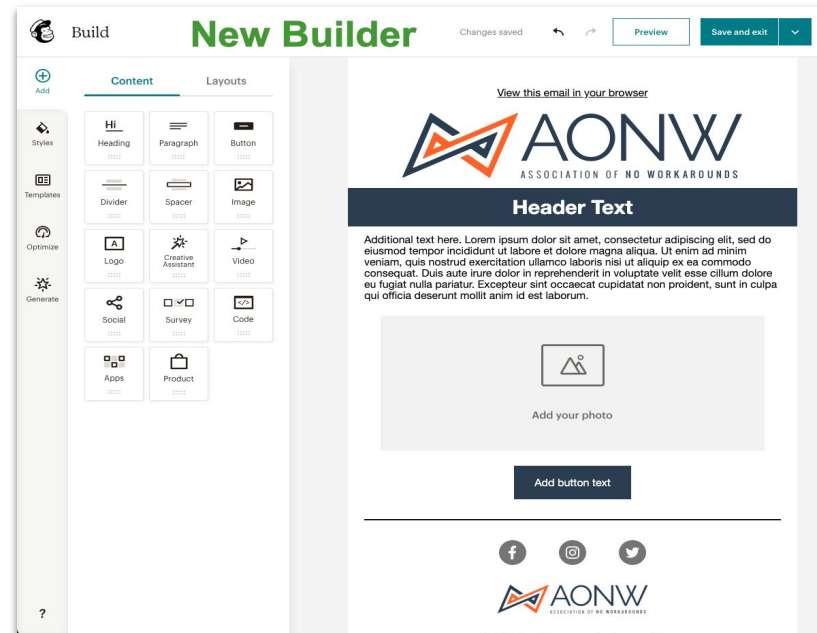
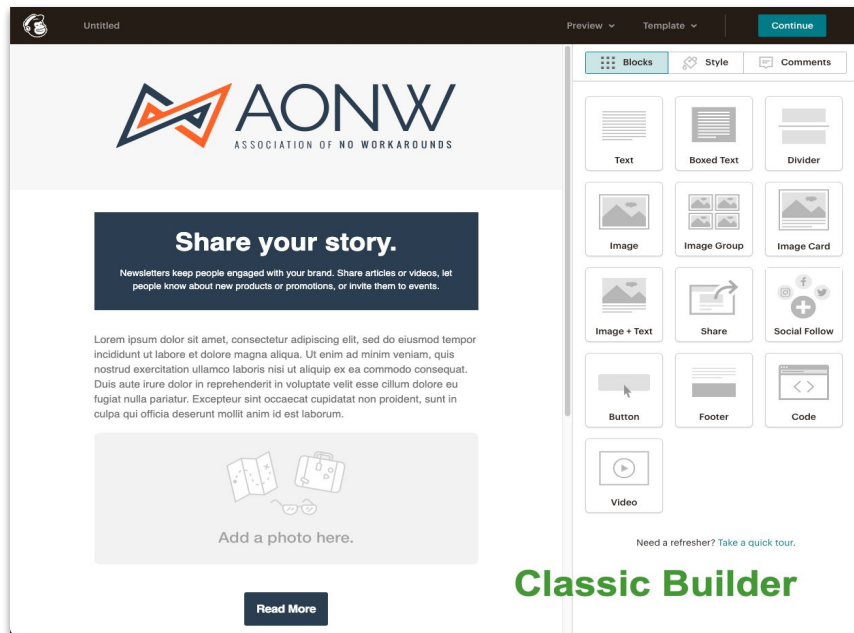
If you're tracking email preferences as a custom field, think about replacing the default "Update your profile" link in the footer of your emails with a link to your Member Compass.



TIP: Use "AssociationName.org/member-compass#profile"



Which Mailchimp builder are you using?





Which Mailchimp email builder are you using?

① Start presenting to display the poll results on this slide.



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!

- Each Other!
 - Novi Exchange
- How to Improve Your Email Deliverability
 - <https://mailchimp.com/resources/email-deliverability-why-it-matters-and-what-it-takes/>
- Create a Customer Journey (Drip Campaign)
 - <https://mailchimp.com/help/create-customer-journey/>
- Link to [Member Compass Specific Field](#)
 - AssociationName.org/member-compass#profile-NAME-OF-FIELD



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