



Powerful Prospecting

Marketing Automation and the Newly-Enhanced ATS Real Magnet Bridge for iMIS

Presented by:

Association Technology Solutions, LLC
Real Magnet



About ATS



- Serving iMIS community since 1996
- Award-winning, full-service Authorized iMIS Solutions Provider (AiSP)
- Specialization in iMIS investment maximization
- 50+ bridges to integrate iMIS with popular third-party products



Hosted by



Presenter:

Catherine Curtin
Strategic Account Manager
Real Magnet



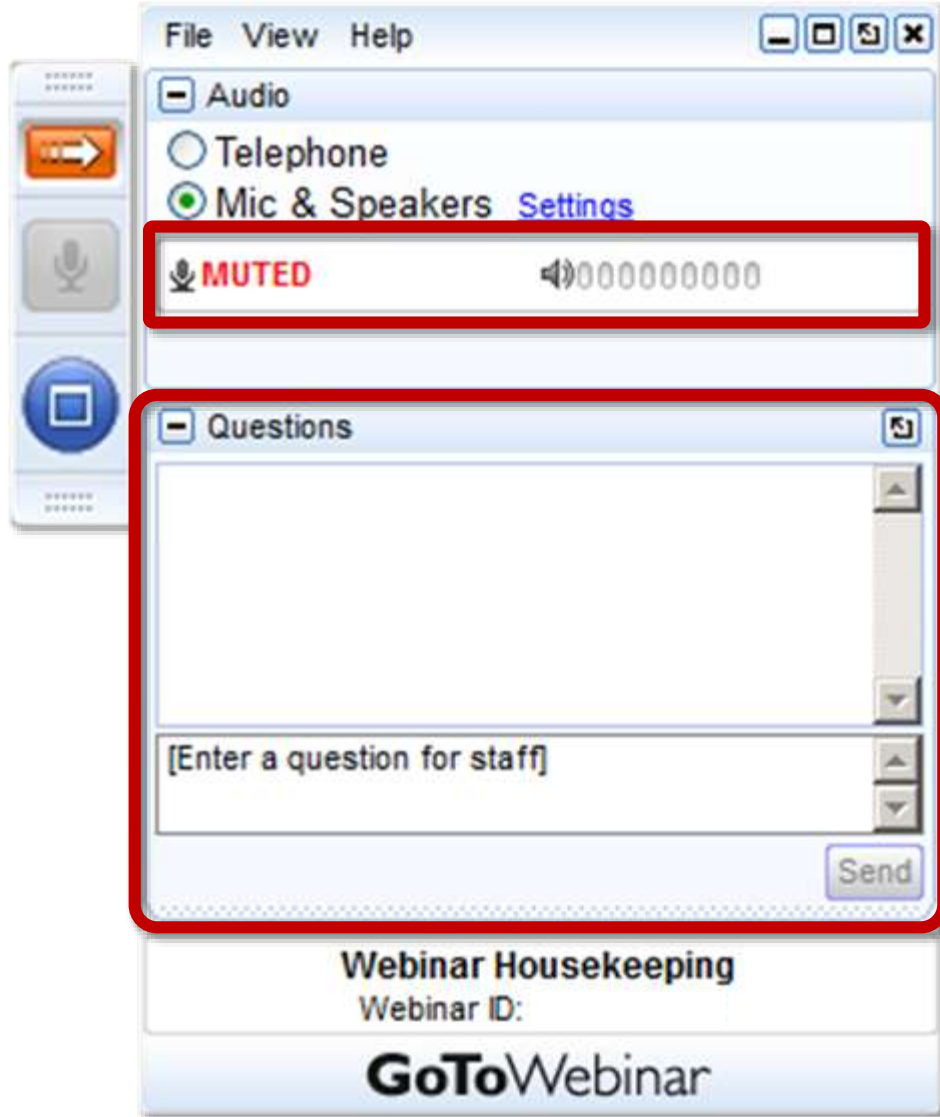
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- Attendees are muted to reduce background noise
- Remember to ask questions via the Questions panel
- Questions will be answered during Q&A after presentation is complete



About Real Magnet



- In business for 15+ years
- Email experts in:
 - Content creation
 - Deliverability
 - Analytics
 - Integration
 - and more...



Our profoundly
simple marketing
automation software
makes it easy for
you ...



Marketing Automation Overview



GENERATE

MANAGE

MEASURE



PERSONALIZATION

DYNAMIC CONTENT



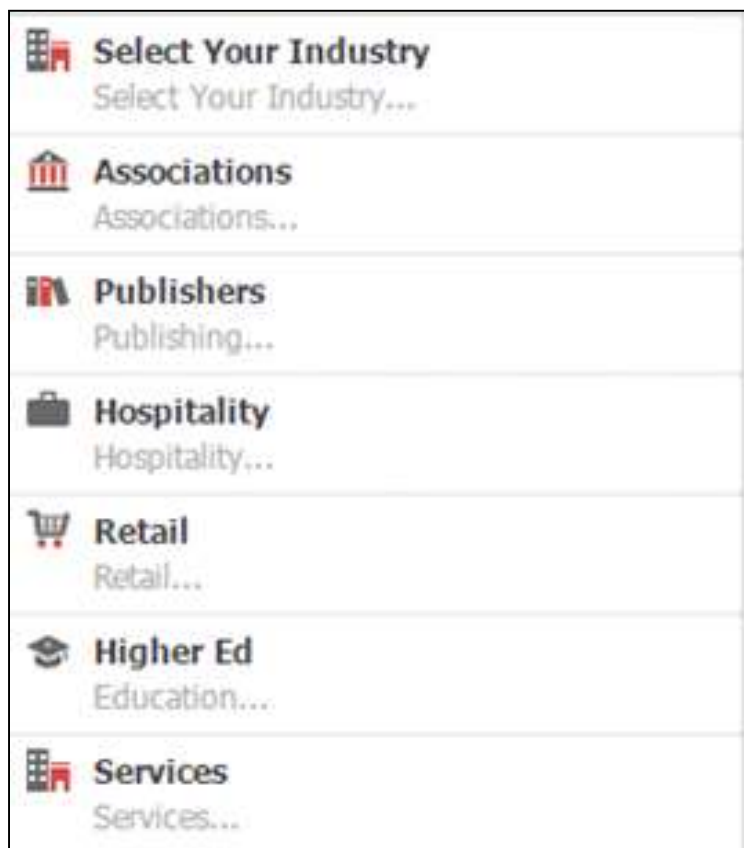
Marketing Automation Overview





Marketing Automation Overview




















Simply choose your Industry.



The System



- Simple select from an array of different type of campaigns
- Uses Templated Approach
- Blank Workflow Builder

Select a Campaign Type...	
 Birthdays & Anniversaries Birthdays, holidays, anniversaries	 Member Renewal Multi-message, time based renewals
 Call to Action Event & product promos, white papers	 Notifications Time-based notification campaigns
 Engagement Segment engaged vs. disengaged	 Re-engagement Inactive and lapsed member outreach
 Event Promotions Conference, seminar, and webinar promos	 Segmentation By interest areas, engagement
 Follow Up Send follow up messages	 Suppression Non-engaged, bounce types
 Fundraising Annual & major campaigns, events	 Welcome Multi-series campaign for new members
 Landing Pages New member acquisition, white papers	 Workflow Builder DIY campaign workflow builder
 Lead Scoring Scoring of members and prospects	



The System



Menu To Do Tips 1. Setup Campaign 2. Review Campaign 3. Deploy Campaign

Campaign Status
Running

Campaign Tools
Dashboard
Campaign Management
Track Campaign
Manage Recipient Tags
Manage Groups
Manage Link Labels
Campaign Description
Help

Start Branch

- Group Enrollment
- Immediate
- Redirect to Messages
 - Dec 11 14 MA For ...
 - End Campaign In ...
 - Dec 11 14 MA For ...
- Never
- End Campaign

Main Flow

- Dec 11 14 MA for Assoc...
 - Dec 11 14 MA For ...
 - Abandonment
- Add Item
- Date & Time
- Dec 11 14 MA for Assoc...
 - Dec 11 14 MA For ...
 - Abandonment
- Add Item
- 4 Days
- End Campaign

Abandonment

- Dec 11 14 MA for Assoc...
 - Dec 11 14 MA For ...
- Add Item
- 4 Days
- End Campaign

+ Add Branch

Goal: A Campaign Member submits the event Dec 2014 MA for Associations . [Remove]



Automation

- Welcome
- Call to Action with abandonment
- Follow-up

Listening/ Behavioral

- Lead Scoring
- Segmentation
- Landing page



Welcome Series



- Welcome Campaign: Templated Approach
- Call to Action: Promote Event with Abandonment and Review the Tracking
- Lead Scoring
- Landing page



Welcome Campaign



1 | Select Campaign Members ⓘ

Tell us who is in the campaign:

Recipients in a group ▼

[NewMembers_Welcome](#)

Specify which recipients should be added to the campaign:

- ONLY Recipients in the group(s) when the campaign is deployed
- ONLY Recipients that are added to the group(s) AFTER the campaign is deployed
- BOTH



Welcome Campaign



2

Select Messages and Send Interval ⓘ

Select campaign messages. If you have not yet created all messages click [here](#).

How many messages do you want to send?

How long do you want to wait? ⓘ

- X number of full days before sending at a certain time of day
- a specific number of days/hours/minutes

Wait full day(s) to send the first message at

Send [DEMO: Welcome 1](#)

ⓘ Wait **30 days** to send next message.

Send [DEMO: Welcome 2](#)

ⓘ Wait **45 days** to send next message.

Send [DEMO: Welcome 3](#)



Welcome Campaign



1. Setup Campaign

2. Review Campaign

3. Deploy Campaign

The following is a review of your campaign. If you wish to make any changes click the "Setup Campaign" link. If you are ready to deploy the campaign, click the "Next" button at the bottom of the screen. [Print Screen](#)

★ Welcome Campaign

A recipient is added to the campaign if they were in the group **NewMembers_Welcome** BEFORE the campaign was deployed or were added to the group **NewMembers_Welcome** AFTER the campaign is deployed.

Wait **1** full day before sending the first message.

Send message [DEMO: Welcome 1](#) at **9:00am**.

Wait **30 days**.

Send message [DEMO: Welcome 2](#).

Wait **45 days**.

Send message [DEMO: Welcome 3](#).

Campaign ends.

Next






Welcome Campaign



Campaign has never been deployed and currently has no members.

- Recipients that are currently in the group **NewMembers_Welcome** will be added to the campaign .
- Recipients that are added to the group **NewMembers_Welcome** AFTER the campaign is deployed will also be added to the campaign.

2 | Campaign Messages

-  DEMO: Welcome 1
-  DEMO: Welcome 2
-  DEMO: Welcome 3

3 | Schedule

Start Campaign

- Start immediately on deployment
- Schedule start for a future date

End Campaign

- End manually
- Schedule end date





Event Promotion



Call to Action: Abandonment

1 | Select Campaign Members ⓘ

Tell us who is in the campaign:

Recipients in a group ▼

All-Members or All-Prospects

Specify which recipients should be added to the campaign:

- ONLY Recipients in the group(s) when the campaign is deployed
- ONLY Recipients that are added to the group(s) AFTER the campaign is deployed
- BOTH

2 | Define Campaign Goal ⓘ

How will we know when recipients reach the goal and to stop sending campaign messages?

When a recipient is added to a group ▼

Registered march Webinars

3 | Select Messages and Send Interval ⓘ

Select campaign messages. If you have not yet created all messages click [here](#).

How many messages do you want to send?



Send MA Promo 1 on



at



If the recipient has not reached the goal, send MA Promo 2 on



at



If the recipient has not reached the goal, send MA Promo 3 on



at



Wait 5 days before transitioning the recipient to the campaign "End Stage".



If the recipient has not reached the goal, they will be transitioned to the campaign "End Stage" and they will not receive any more campaign messages.


Optional: Enable Abandonment for this campaign.


4 | Configure Abandonment [ⓘ]


- a. On which messages would you like to include abandonment?
- MA Promo 1 [Learn More](#)
 - MA Promo 2 [Learn More](#)
 - MA Promo 3 [Learn More](#)
- b. Wait **6 hours** after the link is clicked to consider the recipient abandoned
- c. How many abandonment messages do you want to send?

Set message details:

 Send **DEMO: Abandonment 1**

 Wait **5 days** to send next message.

 If the recipient has not reached the goal, send **DEMO: Abandonment 2**

 Wait **5 days** before transitioning the recipient to the campaign "End Stage".



Let's Log In and Review the Tracking!!



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First Name
Catherine

Last Name
Curtin

Company
RM

Job Title
SAM

I'm not a robot 

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New Record in iMIS




iMIS Sign Out | MANAGER | Cart On Behalf Of: (select contact)

Community Fundraising Events Commerce Certification Continuum RISE Settings Support Requests

Dashboard
Find contacts
Add contact
Manage committees
Manage chapters
Moderate communities
Manage my communities preferences
Manage communication templates
Manage marketing campaigns
Manage segmentation
Manage RFM
Process Manager

Catherine Curtin

SAM
RM



Member type
Web Customer

Status **Active**

Print Info Public Profile
Email Merge
Donate Order Register

Membership is not due for renewal at this time.

Renew Now

My Support Requests

Date Status Subject IsEmergency Phone Email Details IsAMember BestDay BestTime

There are no records.

About Participation History Donor Data Demographics Preferences

Engagement Metrics

This chart displays a count of engagement activities for this contact.

- Event registrations and commerce orders include only those items that are paid in full.
- Gifts are individual donations and do not include pledges.
- Committee counts are the total active memberships in any committee.

Use this information when you talk with our constituents to encourage them to take advantage of their benefits.

Membership

IMIS ID	1057	Major key	
Member type	Web Customer	Status	Active
Billing category		Paid through	
Chapter		Member since	
Renewed		Last update	1/27/2016 12:38 PM
Last updated by	MANAGER	Date added	1/27/2016



Key Benefits



- Create groups in iMIS to pull from Real Magnet
- Map custom fields to Real Magnet
- Push data back to iMIS (opens, clicks)
- Push prospects back to iMIS



Key Benefits



- Based on the iMIS API's (the iMIS Business Objects)
- Works on all versions of iMIS 10.x – 20.x
- Installed on your application server



Questions & Answers



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Question:

If we already have the bridge, is there an additional cost for updating?



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including video recordings, and downloadable presentation slides