ADVANCED WEBINAR

Maximizing Efficiency with Automation

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Meet your Trainer...

Ryan Sauve

Training Specialist

Donor Engagement

EveryAction

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Agenda

1. What is the Automation Tool?
2. Planning out your Workflows
3. The concept of Automation Waterfalls
4. Adding Steps to Automation
    I. Actions
    II. Decisions
5. Reviewing Your Results

What is the Automation Tool

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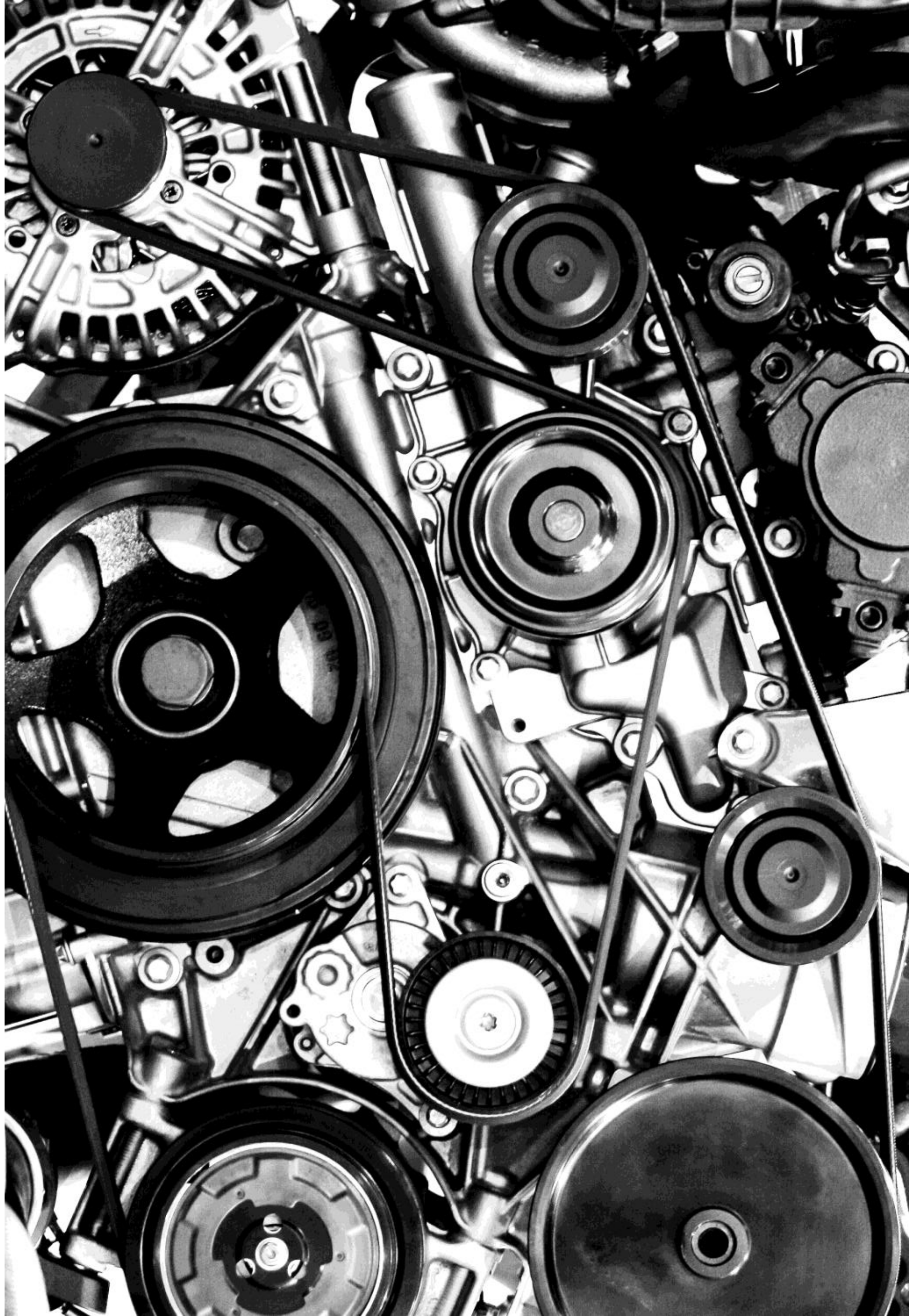
Letting EveryAction Work For You

With the **Automation** tool in EveryAction, you can automate specific processes that would typically require manual action, like:

- Sending a series of emails
- Applying Activist Codes
- Texting supporters
- Screening donors in WealthEngine
- Assigning contacts to internal staff for continued monitoring



The Automation Workflow

Start

Saved Search

(Qualifying Criteria for Entering Automation)

Addition Of Steps

(Actions – Waiting – Decisions)

Branching To A Completed State

Finish

Planning out your Workflows

Carefully considering your end goal

When creating your automation charts, there are pre-requisites needed likely at each step of your flow. Things to consider in this process are:

- Do we have lists/searches saved to meet our goal?
- Are we going to be appending Activist Codes in any phase of this process?
- What should be our communication points, and should these points relate to one another?

The concept of Automation Waterfalls

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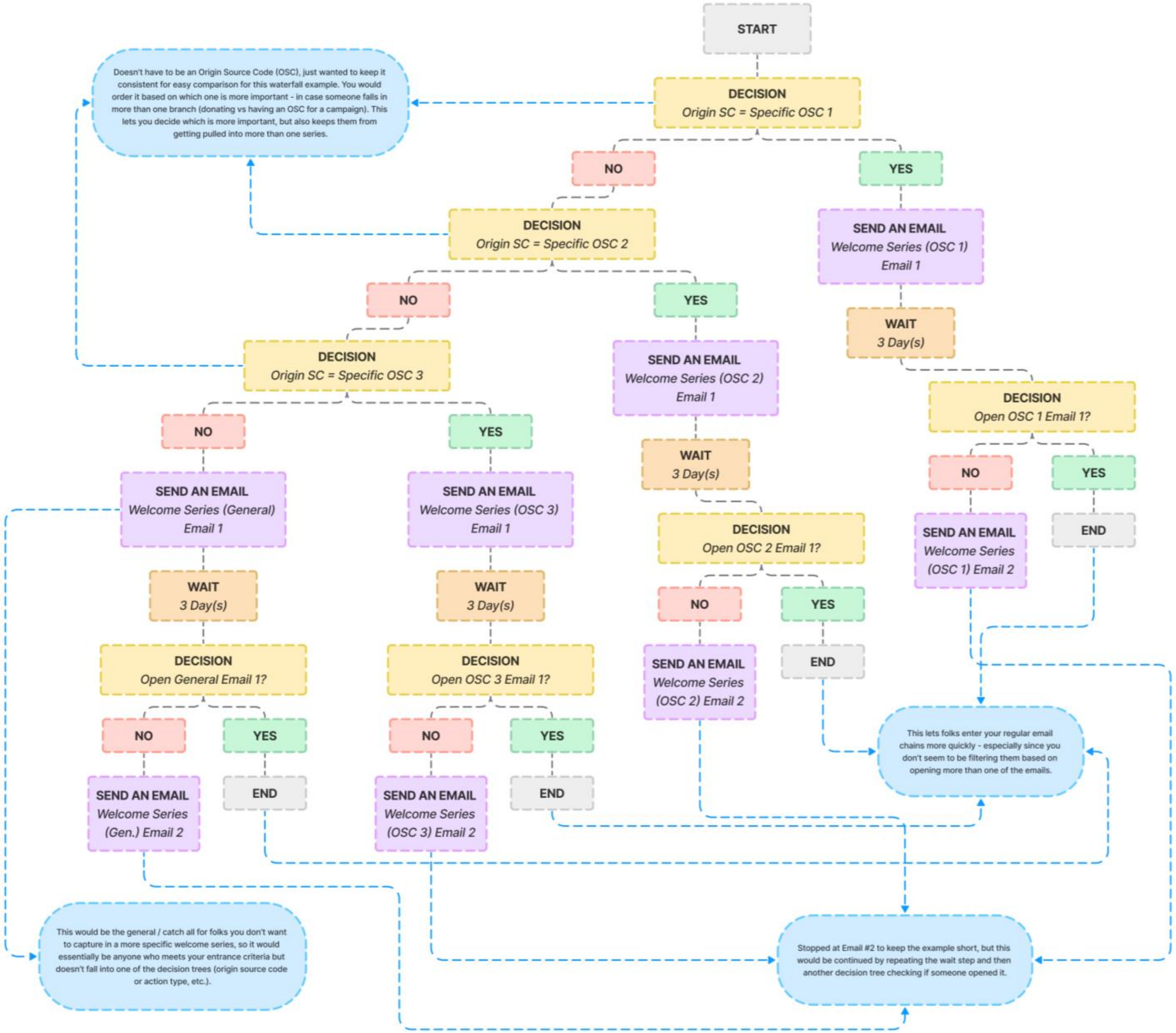
Cascading Complexity

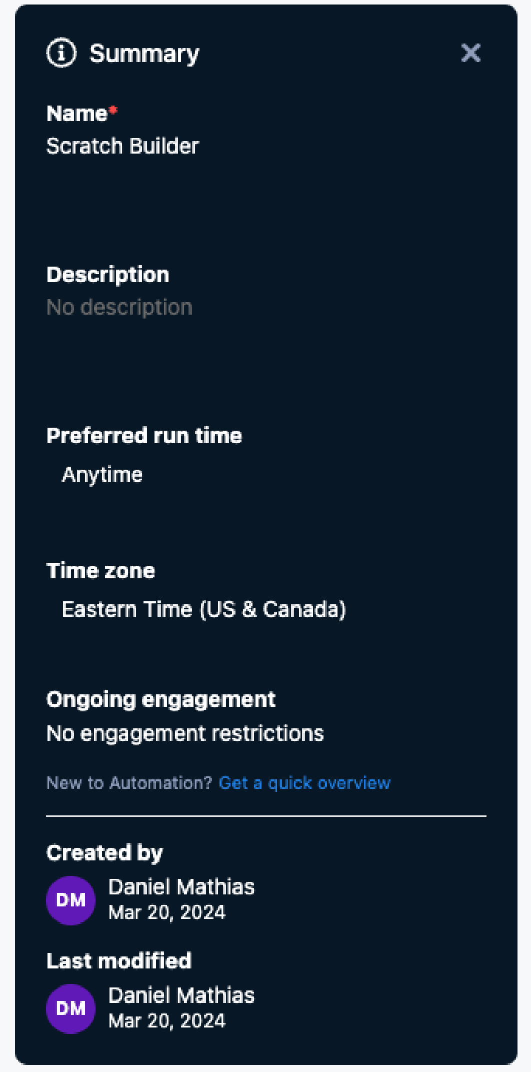
Based on the ideal end goal, the layout of the Automation process can have a numerous end points.

The tool itself provides a proactive checking function that will run prior to the activation of any automation workflow, meaning that if there’s an endpoint that does not have an associated piece of content or action associated with it, you will be notified to correct this.



The Basics of the Automation Builder

Basic Settings



The name and description sections of the Automation setup screen are straightforward, but it is important to point out 3 significant features available from this sidebar:

- **Preferred Run Time:** this is directly influencing the approximate time of trigger points in an automation. This means if it's set to a certain hour period, email/texts/follow ups/etc. will be created or sent in that window.
- **Time Zone:** working in tandem with Run Time, this will allow you to set what time zone these items trigger in.
- **Ongoing Engagement:** This setting is a binary toggle wherein you're designating that this Automation should act as an *exclusive* set of communications being sent (for example, a welcome series or re-engagement campaign) or if those in this current automation should still be included in **all** email sends if they're targeted.

Adding Actions to Automation

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Creating Automated Emails and Email Series

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Email Series in EveryAction

Automating an email series for Lists/Searches created in EveryAction can be an easy way to engage with your supporter base without having to rinse and repeat email creation and sending.

Automation will allow you to leverage a pre-defined set of steps for outreach based on a person's contact criteria, like:

- Have they stopped opening emails?
- Are they a lapsed donor?
- Are they brand new to your organization?
- Is it their birthday?

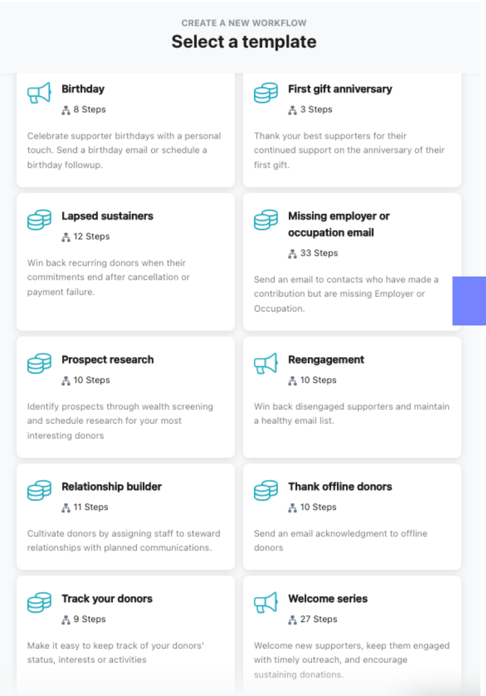
Once the criteria for entry is determined, we can then use this pre-defined tree to perform actions based on how they interact with this series.

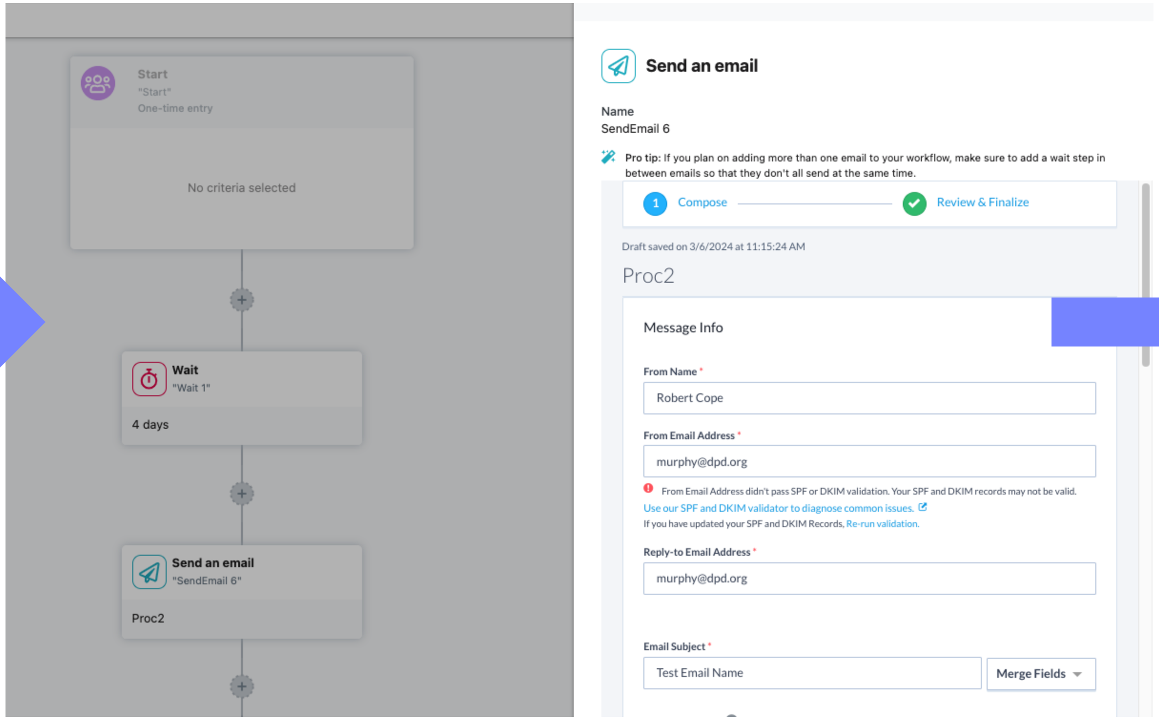
Series creation flow

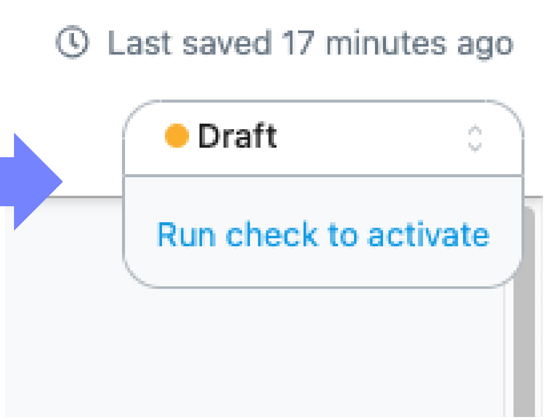
Deciding on your workflow layout:
Who do we want to contact, why, and what is our end goal?

Creating your email or action steps and content:
What steps should someone take to either complete or drop out of the series?

Launching the series:
Begin the communication process for qualifying contacts.







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Automating Mobile Messaging

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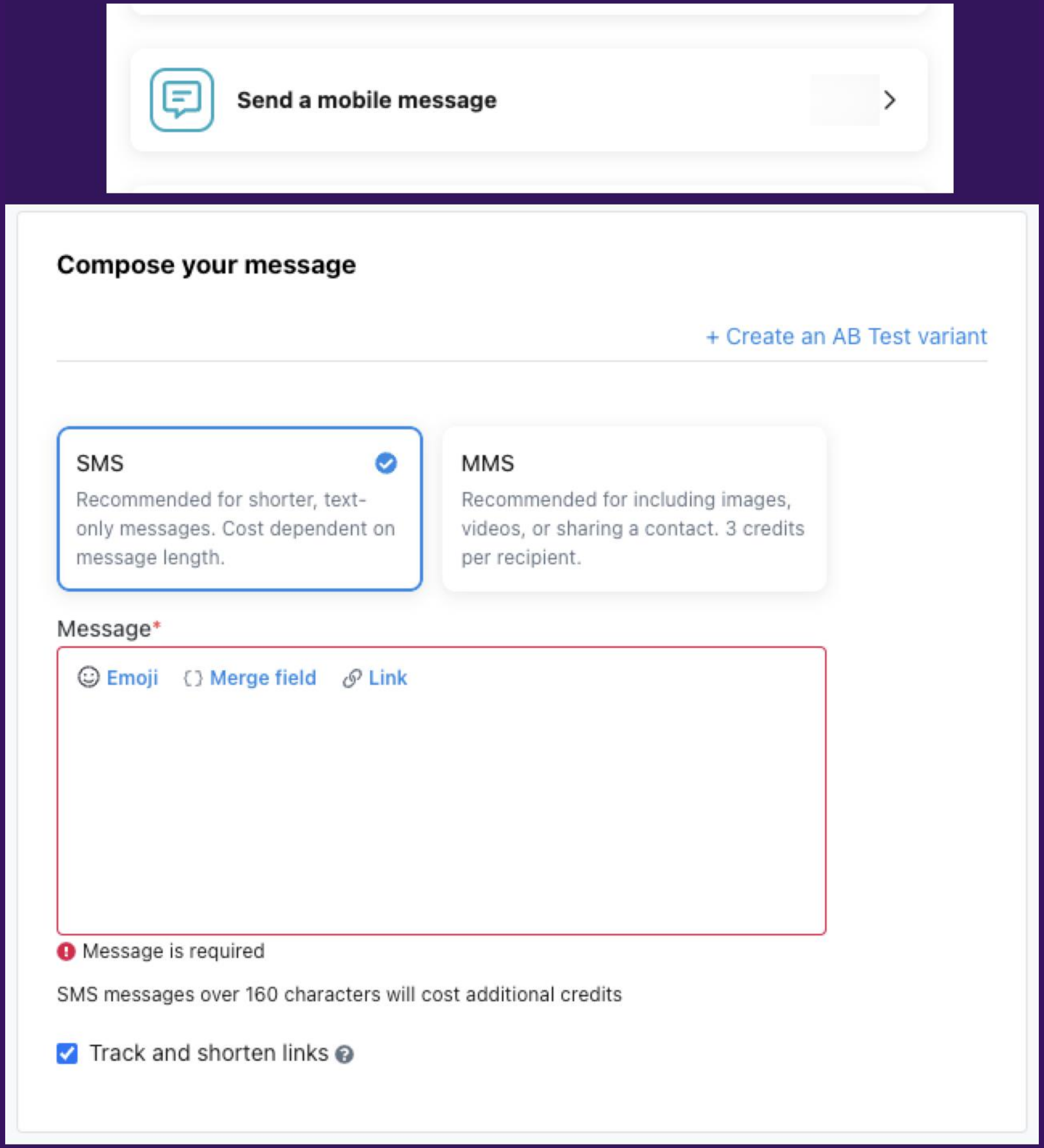
Keeping Your Contacts Informed

Creating an automation starting with search criteria like “*Filled out a sign-up form that includes Texting Opt In*” is a perfect opportunity to either warm your contacts to your regular SMS cadence by sending an introductory message after they’ve opted in to receiving messages.

This can be used to inform or remind registrants or volunteers about evergreen or recurring events via text.

Finally, this can also be used in tandem with MMS messages to include things like a special “thank you” image for specific campaign contributions as well.



Automating Contact Outreach

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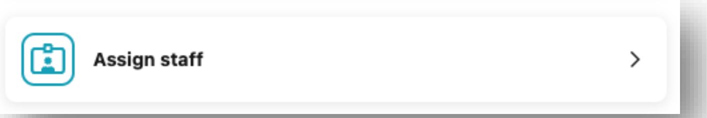
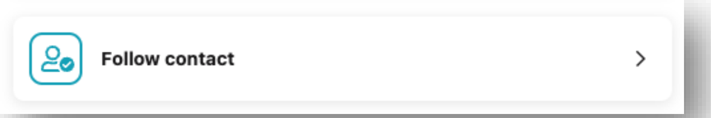
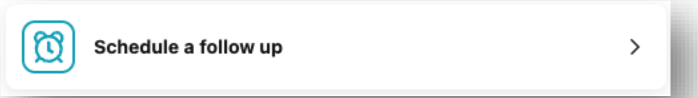
No more playing catch-up







While assignment of staff is typically most often used for specific functions within EveryAction, this can allow for your relation managers or solicitors to be automatically applied to Contacts as they take specific actions online or through their event activities.

If there are contacts in your database that need to be tracked more closely than others, considerations can be made for automated following of these records.

When used in tandem with things like the **Changes to Contact Records Report** to see any updates that have occurred with these records of importance.

Potentially the most important of the features shown here, the ability to automate follow ups, meaning you can operate at a quicker pace for situations like:

- Performing personal outreach when high-value contacts enter your database
- Ensuring that lapsed sustainers are contacted upon receiving a notice that their gift has failed
- Initiating verification of submitted stories

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Automating Activist Codes

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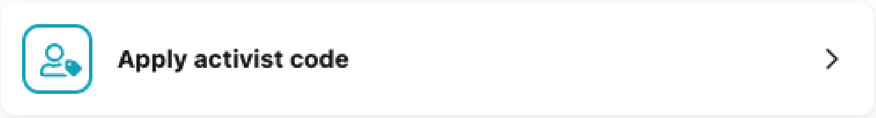
Tracking Contacts Automatically



While addition or application of Activist Codes through automation may seem unnecessary, this feature can lend to creating your automation waterfalls.

This can be rolled into decision paths wherein an action is taken, an activist code is applied, and then contacts are bucketed to different communication paths based on what activist code they've fallen under.

An ideal situation for this would be separating people out by giving levels to append specific Activist codes through automation.

In the same sense, the ability to remove an Activist Code can be a handy tool in keeping your Targeted Email segments clean.

An example here would be to create an automation path wherein someone's last Targeted Email Open date was beyond 90 days ago, thereby removing an activist code that is placing them into that targeted segment.

This way, your list is only including your most engaged Contacts in terms of reading your communications.

WealthEngine Data Gathering

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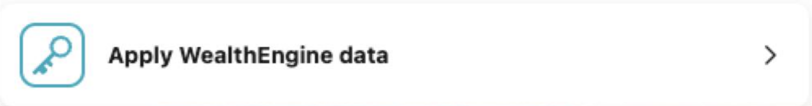
Keeping pace with Potential To Give



While WealthEngine is a paid add-on to your EveryAction package, it would be a huge missed opportunity to not highlight the automated feature of screening WealthEngine data.

WealthEngine data may not change on a regular basis, but creating a simple screening automation will allow you to keep pace with all new contacts in the database, processing them as soon as they're added or once they've given a gift.

This can be a huge support structure for any of your solicitors or planned giving officers, allowing them to adjust their asks to more appropriate figures based on the information that WealthEngine provides in these screenings.

Automation Decisions

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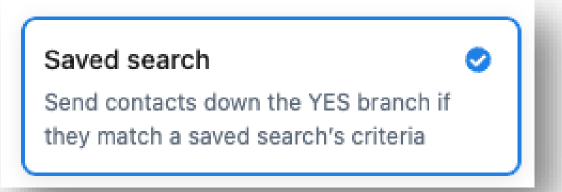
Are you in or out?

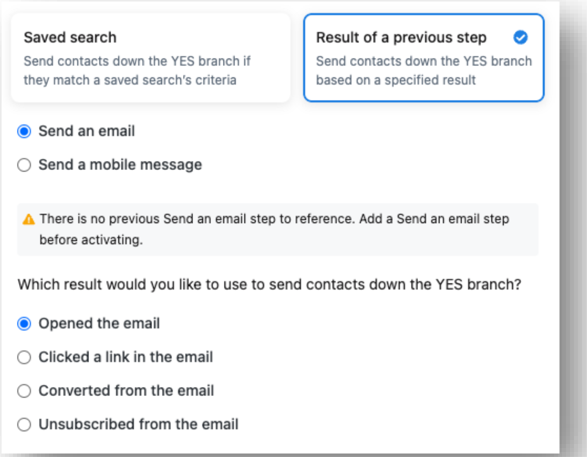


Of any of the facets of Automation, typically **Saved Search Based Decisions** are where the most pre-planning comes into play.

These decision paths are creating yes/no branches based on the search criteria in relation to where your Automation started.

For example:

- First step, automation begins with “Has Submitted an Online Event Registration” search criteria
- Second step, branching people to separate paths depending on if they’re coming alone (no path) vs. registering as a table (yes path)
- Third step, creating a *second* search of “Has submitted **specific form** under **specific ticket tier**”
- Fourth step, sending a follow up email to have folks submit guest information if they’d not done so previously.



Depending on the inclusion of text or email based actions in your Automation, the **Result of a Prior Step** path may be easier to branch to end points.

For example, if our Automation starts with “Submitted Sign Up Form”, and triggers a Contribution ask email, the steps could look like:

- Send Contribution ask email
- **Result of a Prior Step** is “did convert from the email”. If yes, they are considered as “having exited” from the series, as our goal was to get them to contribute. If no, we can insert a 5-7 day wait period, and they’re sent an additional email asking them to give.

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Creating Triggered Emails

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Automating minutiae

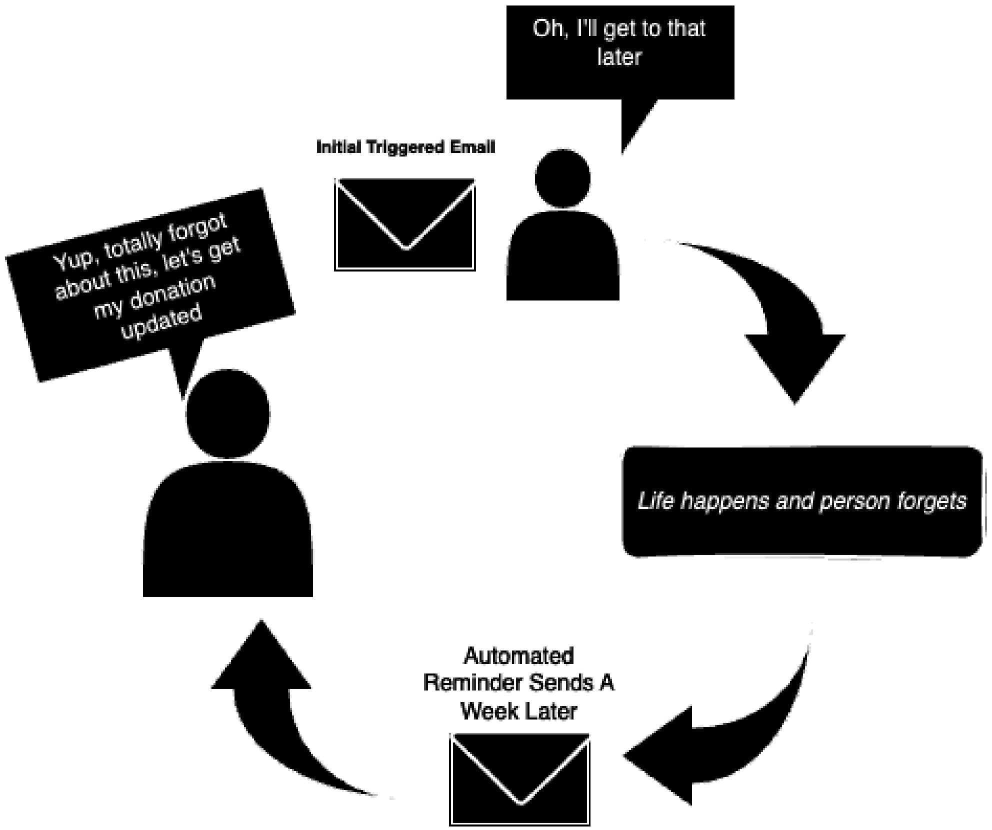
The Targeted Email tool includes a feature that can help streamline common ”minor” issue emails through the **Triggered Email** tab. This section will allow you to create content that recursively sends communications to your contact base when they perform a certain action, such as:

- The **recurring commitment failure** message – This message informs a donor that their sustaining gift has failed and encourages them to either submit a new donation or use the Self-Service portal to update their donation information.
- The **Subscription Confirmation** message – When using the ”Confirmed Opt-In” feature within Online Actions, this will send a message to allow a contact to confirm that they truly do want to receive communications from your organization.
- The **Self-Service Contribution Receipt** – this will allow a contact send themselves receipts for past contributions without having to contact an internal team member.

Combining Triggered Email and Automation

It may be going a step beyond the standard tactic, however, in cases where you've found lapsed donors to be particularly sticky, consider combining the triggered emails for Recurring Commitment Failures into an automation to ensure that these are being received and opened.

If they're *not*, a second/third/fourth email can be sent at a regular cadence to attempt to recapture those donors before they're fully unengaged.



Reviewing Your Results

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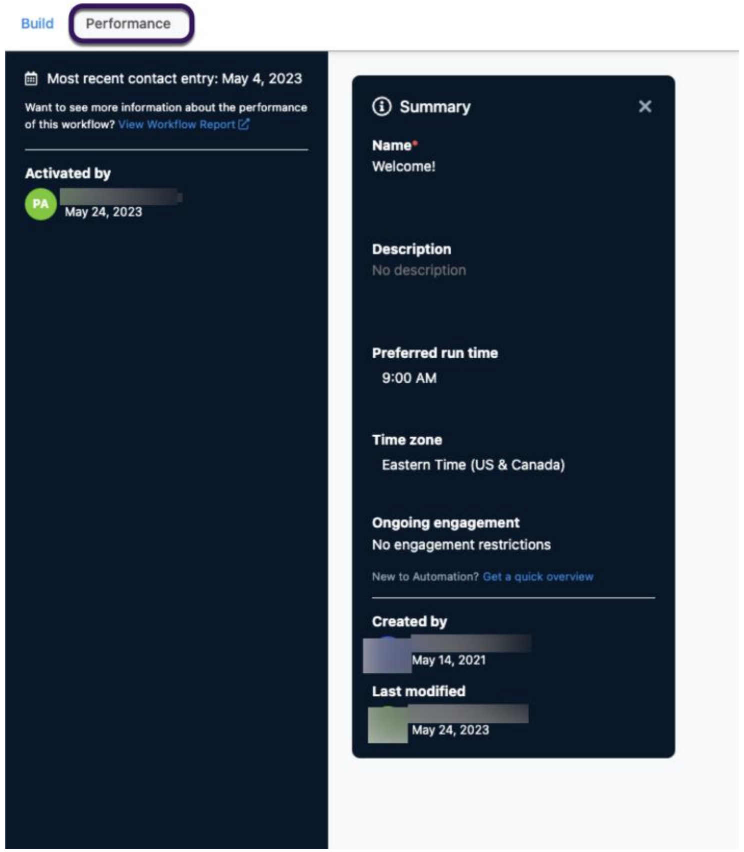
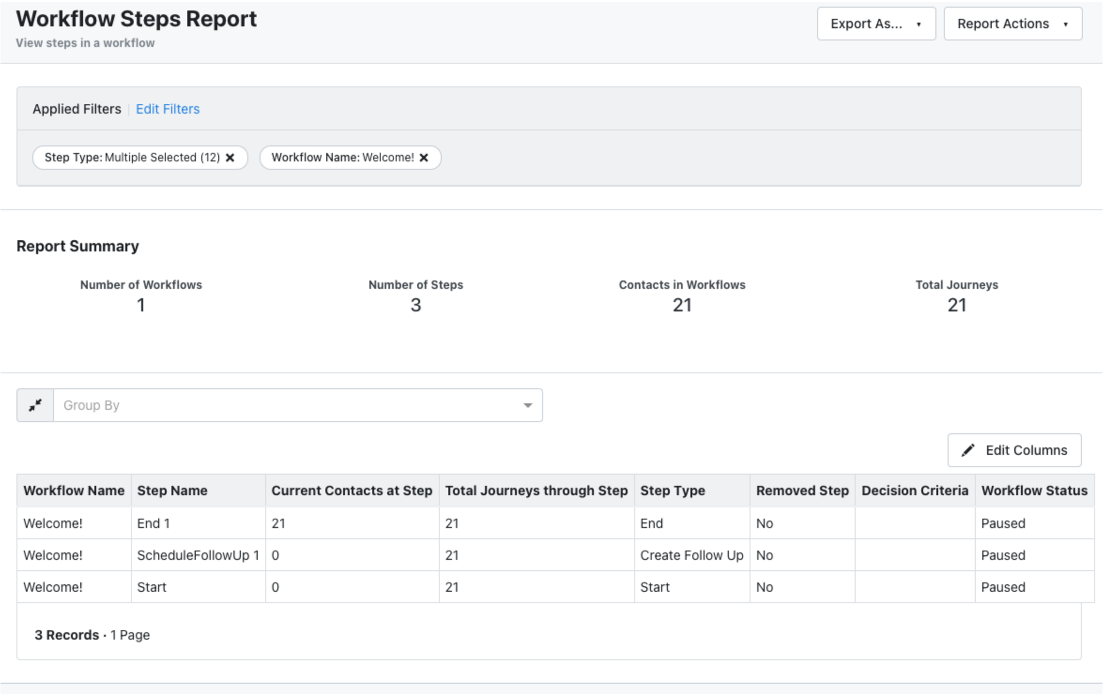
Overview vs. In-Depth Reporting

Through the Automation dashboard, overview stats will be displayed for each step/action, and a performance tab is present for each Automation created.



Additionally, the **Workflow Steps Report** will contain a more robust set of details showing how your Automation is performing and can be customized to include details such as the Start Criteria and Email Names for communication steps.



Additional Resources

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Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM

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Knowledge Base Articles

[Overview: Workflow Automation]

[Monitoring Workflow Automation Performance]

[How to: Monitor Triggered Email]

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Additional Training

- Bonterra Academy: https://www.bonterratech.com/training
  - Foundational Webinar Series
  - Upcoming initiatives
  - Videos in Bonterra Academy

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Thank You for Attending!

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