



Presentation Guide: Email and Campaigns

In this session, marketing administrators will train their end users on how to create emails and leverage campaigns and Journeys to automate marketing efforts and track effectiveness over time.

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Agenda

- Leveraging email and campaigns
- How this helps you win
- In-platform training
- Best practices when using lead capture apps
- Your next steps!

Leveraging Email and Campaigns

- Send emails – capability to send emails directly to their database within the platform.
- Use campaigns – leverage auto-campaigns and journeys to automate your marketing efforts and ensure you're delivering the right message at the right time.
- Review email statistics – get access to relevant email stats to track and monitor the effectiveness of your email marketing.

How This Helps You Win

- Robust library – access to a robust amount of marketing content to leverage to expand your business.
- Set it and forget it – use campaigns and journeys for automated marketing communication.
- Email statistics – track the performance of your email marketing.

In-Platform Training

Before you begin - assist and guide users with the login process based off your organization's login method

How to Send a Direct Email

- Within the navigation menu, click on Email Marketing > Emails.
- Select any email template you wish to promote, click Actions > Select on the right-hand side.
- On the left go over the following fields:
 - Name: internal facing, only users see the name of the email.
 - Subject
 - Preheader Text
 - Date/Time



- Next review the content of the email. If the email is editable, cover the areas of the email the users can edit.
- After creating an email, click Recipients at the top of the page.
- Show how users can pick their recipients.
- Click Send Email.

How to Review Email Statistics

- Within the navigation menu, click on Email Marketing > Email Stats.
- Email stats are tracked for direct and automated email sends.
- Review the various stats users have access to:
 - Type: indicates whether email was a direct send or through a campaign or journey.
 - Sent: % of emails that were sent to recipients.
 - Delivered: % of emails that were delivered successfully to recipients.
 - Open Rate: % of recipients that opened the email.
 - Click Rate: % of recipients that click on a link embedded within the email.
 - Bounces: % of email addresses that bounced back due to an error.

How to Activate Auto-Campaigns

- Within the navigation menu, click on Campaigns > Auto-Campaigns.
- Identify a campaign to demonstrate.
- Click on Actions > Edit Group Assignment.
 - Before picking groups, let users know that only groups can be added to campaigns, not individual contacts. It is important for them to keep their groups organized and maintained for this reason.
 - Also show the ability to view actions and/or view campaign library if users want to preview the content.
- Select groups and click Submit.
- Point out the increase in the Group Count and Contact Count fields.

How to Activate Journeys

- Define and explain what Journeys are: intelligent automated marketing that sends the right message at the right time.
- For Journeys that were made available to users, show them how to activate them.
- Within the navigation menu, click on Journeys > Available Journeys.
- Check off the box to the left of any Journey. At the top left, click the globe icon (Publish Journey).
 - Note the Journey disappears from the page and can now be found within Journeys > Active Journeys.



How to Add Contacts to a Journey

- Within the navigation menu, click on Leads and Contacts > Contacts.
- Click on the box of any contact.
- Click the Actions button at the top left.
- Click Add a Journey.
- Select a Journey from the dropdown.
- Click Submit.
- Back on the contacts page, click on any contact itself.
 - Scroll down, on the right-hand side also show users they can add contacts to a journey within the contact record itself.

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Best Practices

- Send email communications through TE and use statistics to track their effectiveness.
- Leverage the “all in, all on” mentality when it comes to campaigns and journeys to make sure that you’re staying in front of customers.
- User groups when you want to consistently communicate with that group over time.

Going Forward from Here

- For adoption and retention purposes – encourage your audience to access supporting documents, videos, and resources and demonstrate where they can access our Help Center within the platform, as well as reaching out to our Product Support team.