

Marketing Automation

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Marketing Automation

- **What is Marketing Automation?**
 - **For some it is just scheduling an email to go tomorrow at 8am.**
 - **For others – Deliver personalized experience at every engagement across multiple channels**



Marketing Automation

- **Why Marketing Automation?**
 - **Time and Cost Savings**
 - **Automate redundant tasks**
 - **More effective and drives a higher ROI**

The Aberdeen Group quotes
87% of top-performing firms are
using Marketing Automation



Gartner Research quotes

Customers will manage 85% of
their relationships without talking
to a human by 2020.



How do Marketing Automation
emails compare to other emails?

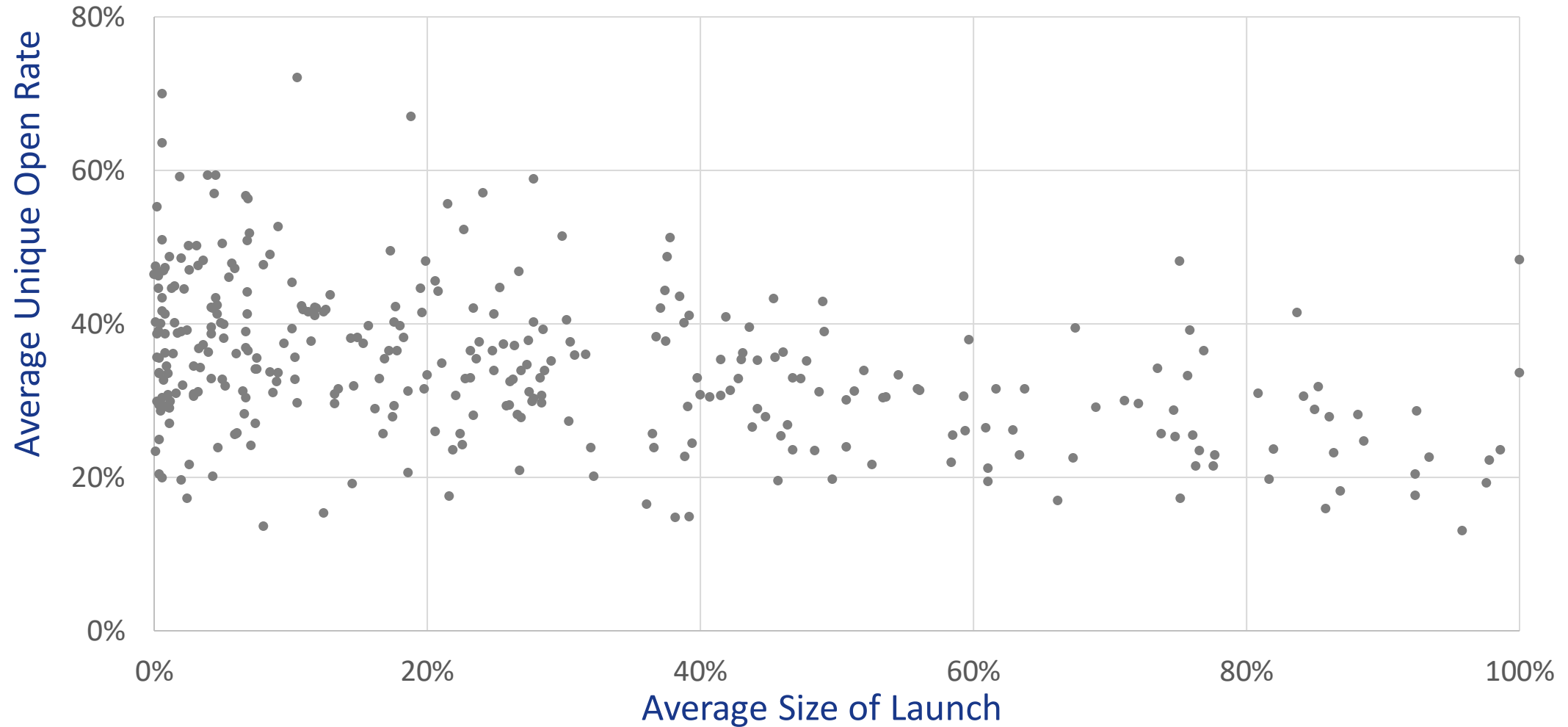




- **2016 Analysis**
 - **Over 350 Credit Unions**
 - **Over 330M Emails**
 - **Over 22K Campaigns**

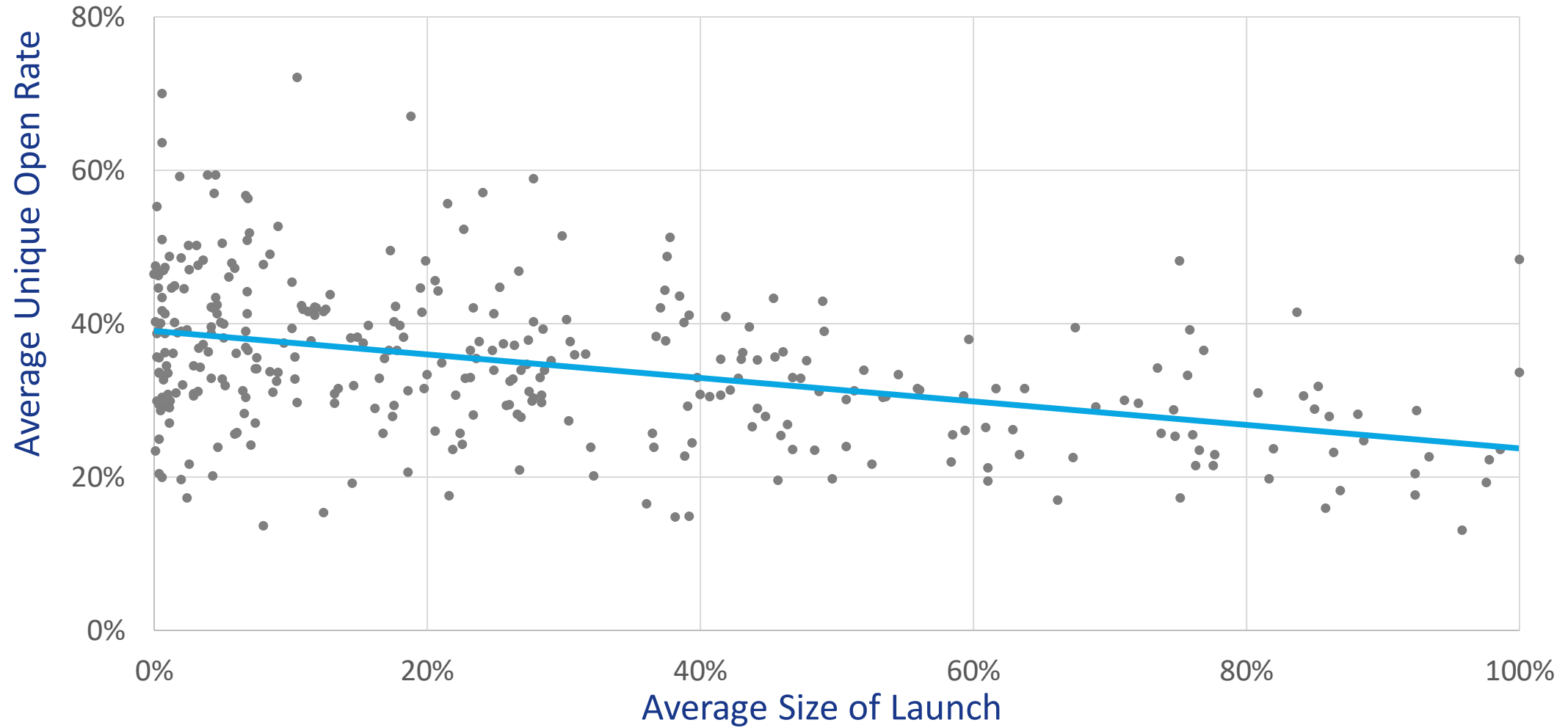


Average Unique Open Rate vs Average Size of Launch





Average Unique Open Rate vs Average Size of Launch





ROI Spectrum

The diagram consists of a large orange arrow pointing to the right. The arrow is positioned horizontally across the middle of the slide. Below the arrow, three labels are placed: 'Batch & Blast' on the left, 'Segmenting' in the middle, and 'Marketing Automation' on the right. The arrow itself is a solid orange color with a white outline and a drop shadow.

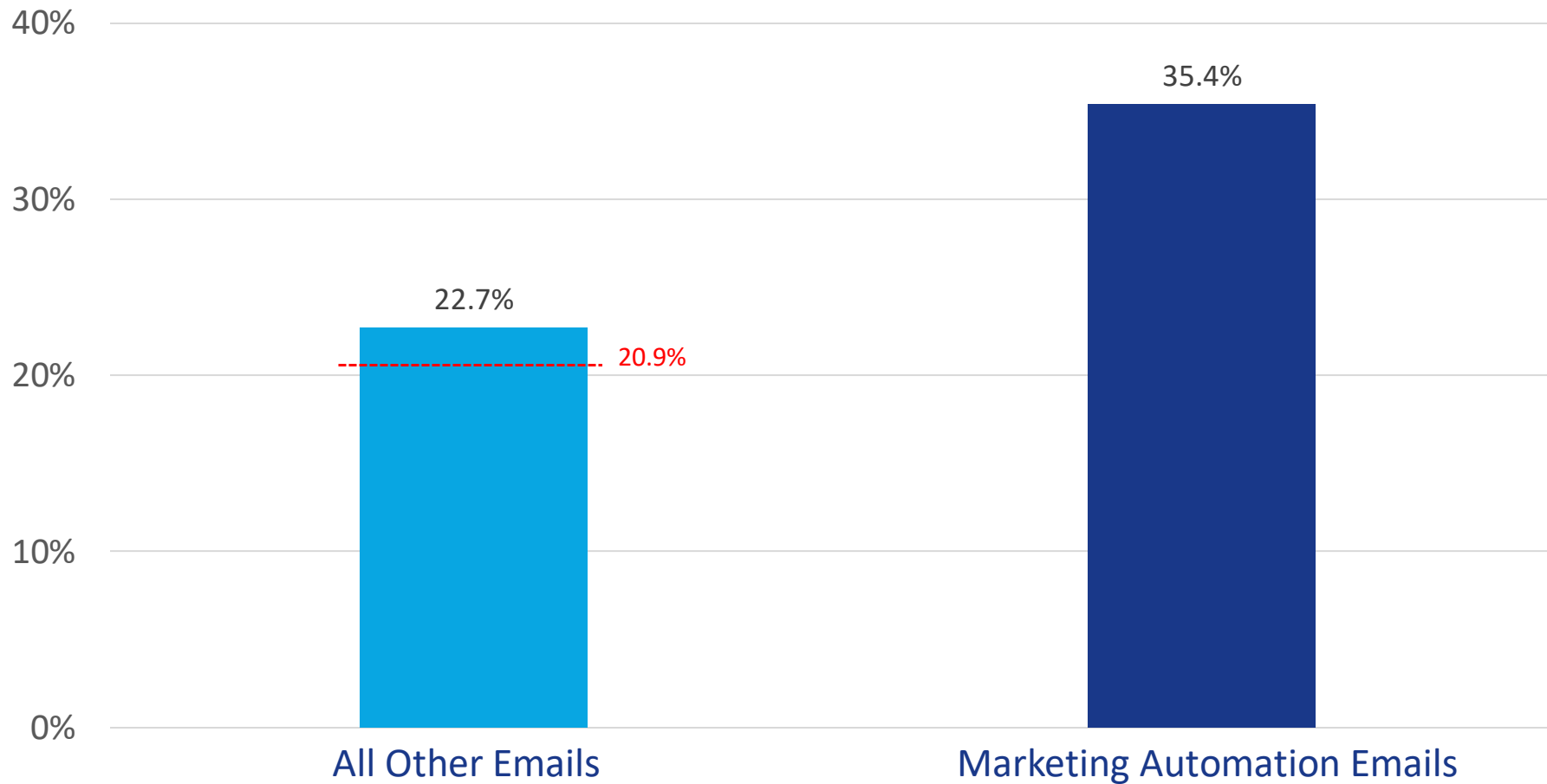
Batch & Blast

Segmenting

Marketing Automation

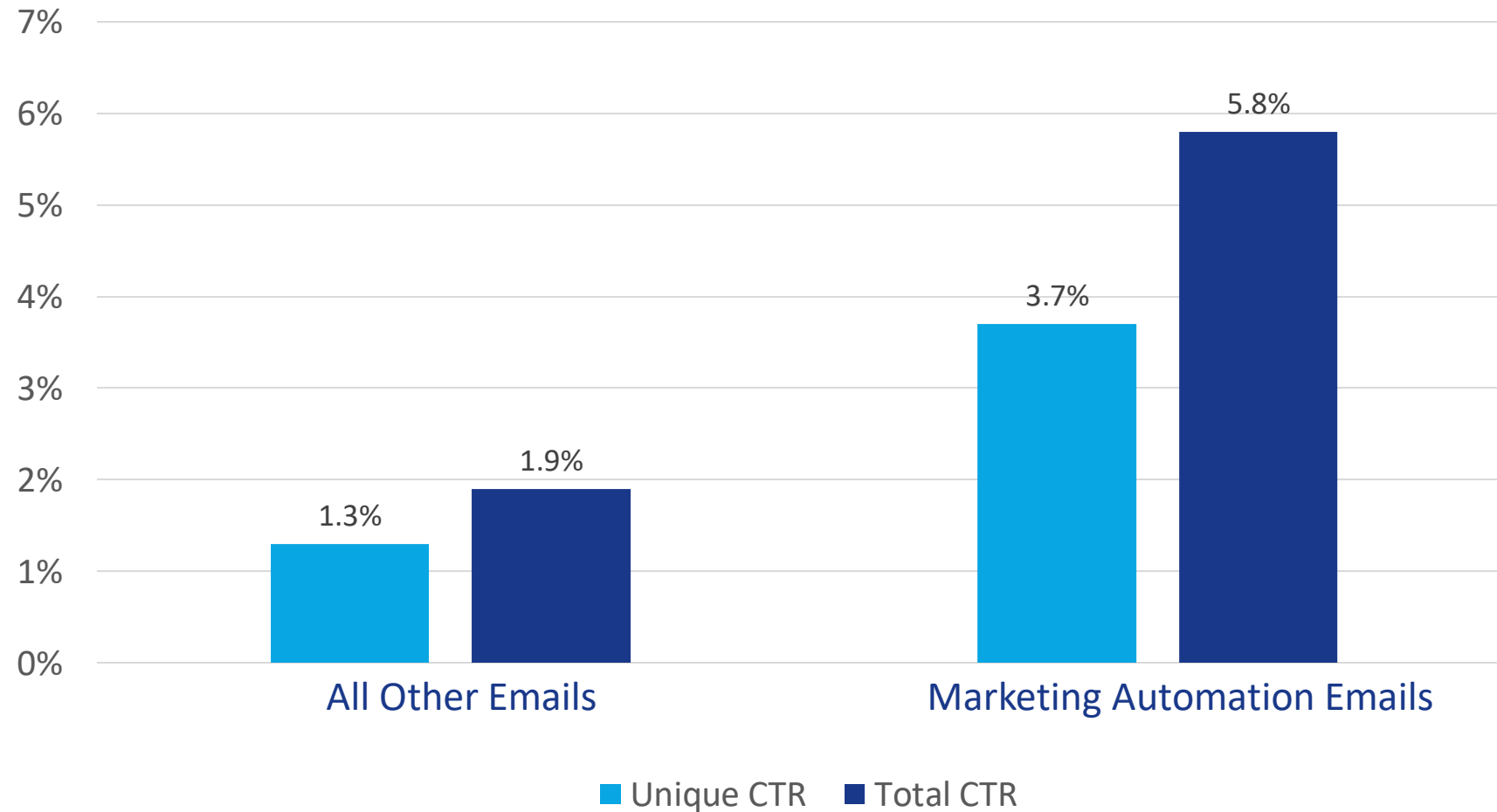


Unique Open Rate





Unique/Total CTR



How are Credit Unions using Marketing Automation?





How are CUs Using Marketing Automation?

- **Account Incentives**
- **Business Account Offers**
- **Loan Application Process**
- **Loan Recapture**
- **Mortgage Pre-Approval**
- **HELOC**
- **Credit Card Activation Reminders**
- **Surveys**
- **Birthday/Anniversary**



How are CUs Using Marketing Automation?

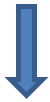
- **eStatement Notifications**
- **#1 Use - Onboarding**



Marketing Automation

Member/Customer Joins

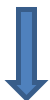
✉ **Day 1** – *Welcome Email*



✉ **Day 7** – *Offer/Info #1*



✉ **Day 14** – *Offer/Info #2*



✉ **Day 21** – *Offer/Info #3*



Messages Can Be Highly Personalized

- How they joined
 - *Branch. On-line. Indirect*
- From the Branch Manager
- Age
- Language (English. Spanish)



Marketing Automation

- Consider and Ponder what **YOUR GOALS** are **FIRST**
- What Problem are you Solving?





Wide Variety of Solutions

- **Trigger communications based on account activities**
 - *Multi-Channels: Email. Print. Text. Voice. Web*
- **CRM Integration**
- **Social Integration**
- **Web Site Visitor Tracking**
 - **Being able to identify individuals and their activities**
- **Reporting and Analytics**



Understand the Requirements

- Data





 **Onboarding - Manage - Onboarding Sample**

  [Add New Offer](#) [Test Case](#) [Manage Fields](#)

▼ **Welcome Email**   

Send to everyone once



 Send the Campaign Welcome New Member


▼ **Checking**   

If Checking is equal to 0  

If Age is less than or equal to 18 
and Gender is equal to E  

 Send the Campaign Free Checking - Female 

If Age is less than or equal to 18 
and Gender is equal to M  

 Send the Campaign Free Checking - Male 

If Zip Code is in the list of (84095,84070,84118) 

 Send the Campaign Choose Campaign 



Understand the Requirements

- **Data – Where does it live? How do you get the data? How Secure is the Data?**
- **Time involved – Design and content of messages**
- **Which messages to automate and priority of messages**
- **Security and IT Involvement**
- **Examine the Costs**



Next Steps

- **Select a provider that best matches your goals**
- **Plan. Plan. Plan**
- **Understand beginning metrics**
- **Track and Measure Results**
- **Modify as Needed**
 - **Reviewing and analyzing the data**
 - **Updating the content to drive the response you want**

Q&A

