



Guidebook on Optimizing SharpSpring to Preserve Your Sending Status

Marketing automation, as a platform and a movement, can provide tons of value to associations. But simply purchasing a marketing automation platform, particularly one as sophisticated and layered as SharpSpring, just isn't enough. Investing in any marketing automation tool isn't just about alleviating staff time repetition through automated workflows. Operational efficiencies are a nice-have but are a fraction of the tool's design and capacity.

Truly investing in a marketing automation tool (both fiscally and philosophically) means adopting an entirely new way of going to market. It's stepping outside of the operational efficiency and stepping into growth planning. Getting your team technically trained on the tool is important. But getting your organization aligned with the principles associated with the tool is imperative.

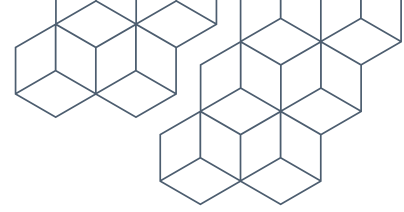
As leaders in the association space, we've worked with a number of clients who've fallen prey to applying traditional email marketing (outbound) principles to their marketing automation (inbound) platform and, in all cases, sending reputation takes the fall. Specifically, these associations run into:

- 📦 Platform compliance issues
- 📦 Lost dollars spent on unengaged audiences
- 📦 Dwindling sales numbers
- 📦 Damaged brand reputation

Realizing the power of the tool lies in the processes in place and the people using it, we've pulled together some best practices to truly optimize your marketing automation tool and keep your sending reputation intact.

These best practices and precautions are meant to act as the guidepost to keep you out of bad sending status in the first place. However, if you do fall into bad sender status, this handbook will walk you through what to expect and steps you can take to get back into compliance.





Stay in good sending status by optimizing your approach

Run Persona-Based, Not Campaign Based Programs

Running a persona-based campaign means mapping your premium content assets to your buyer's journey as dictated by your personas. Then nurturing leads along a sequence that filters the unfit and unengaged out of your journey and converts high quality leads into upsells or membership. This is a very personalized, intended, and goal-tied approach. When organizations run status quo program-based campaigns out of their marketing automation tool, their constituents inevitably bear the brunt. They get hundreds of irrelevant email blasts in their inbox with no data-driven value. Ultimately, when you blast an email out to cold lists in your database, a whole host of problems can arise, including spam traps, bounces, bad emails, unsubscribes, and unengaged audiences who aren't consuming your content.

Marketing Automation tools are designed to nurture engaged audiences and disqualify unengaged and unlikely customers, so you can better focus your time on converting prospects. Because of this inherent design function, SharpSpring and other Marketing Automation tools are much stricter around bad email sending practices.

Diversify your approach based on your learnings

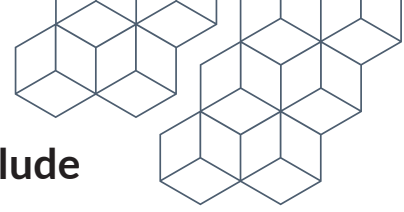
Campaigns aren't just about driving conversions. They're also about gaining insight. As your journeys play out, you gain more and more intel on your personas, your channels, and your content. It's important that you apply what you're learning to your campaigns. For instance, you might surface an audience who is highly engaged with your Facebook content. As you learn more about that audience, you can serve up really specific content tracks through that channel. Diversifying your channel mix is key to appealing to your audiences. It's important that you show them that you're listening, and give them what they want versus mass emailing them with no consideration of engagement or past behavior.

Use Lead Scoring Principles to Nurture Your Most Engaged Audiences

Lead scoring is a foundational feature to marketing automation. It is a quantitative way to measure what is too often a qualitative behavior. Breaking it down: it is how your audience is interacting with your email messages, social channels, premium assets, and more. Ultimately, it's a way to measure and target the audiences that are holistically more engaged with your organization.

Once you've set up your lead scoring principles according to industry standards and your organizational hierarchies, you'll start to see bands of lead scores that track varying engagement levels. For instance, you may surface really warm leads that need a more personalized touch with your membership team. Or you may collect baseline KPIs that will help further refine your targets. Ultimately, you'll start to run campaigns based on your defined thresholds for success.





Build Rules in Your Campaign Workflows to Naturally Exclude the Unengaged

Your nurture campaign, based on your key persona, and mapped to your content (both marketing and programmatic) can get even more granular to ensure you're talking to the right prospects. You can use rules and branching to push prospects into different funnels depending on their content interests or levels of engagement. If you have prospects that haven't engaged with any of your assets, this is your opportunity to decrement their lead score, reroute them to a different journey, or suppress them altogether. Build rules in to identify the leads that are both a good fit and engaged, and don't spend the time on the contacts that aren't interested in what you have to say. Particularly when most automation platforms follow the 'pay by contact' model.

Leverage 'Drop the Cookie' Campaigns

If your member data is integrated with your marketing automation platform, leverage 'Drop the Cookie' campaigns so that your member data syncs up with the behavioral and psychographic data collected through SharpSpring. Campaigns designed specifically to drop the cookie is simply a means to get your members and prospects interacting with SharpSpring so that you get the full view of data for every contact. While there are several options, 'Drop the Cookie' campaigns can range from adding the SharpSpring code to your membership application, to running nurture campaigns with landing pages, to adding a chat window to your website, just to name a few. Ultimately, you want to see the full data picture--that means you want to know Jackie's Smith's job function (demographic), her aspirational views (psychographic) and the content, programs, activities she's consumed and engaged in (behaviorial) in order to approach her in the right way.

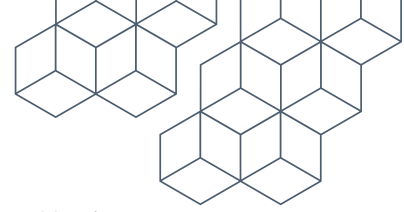
Steps to Take if Limited by Bad Sending

Even with the right philosophies and intentions in place, it's still easy to fall back into traditional "email marketing" practices. While this should be avoided as much as possible, these things do happen. If you do find yourself in a position where your sending status is limited (based on inactive email addresses, unengaged contacts, or even spam traps), you need a remediation plan to get you back on track. Here are some data improvement tactics to build your sending status credibility back up.

Reconfirmation Campaigns

When you cross SharpSpring's good sending threshold, SharpSpring will notify that your sending reputation is at risk and will limit and, in some cases, stop your sending ability until you've reconciled your status. One of the most common approaches includes running a reconfirmation campaign which is a check-in for those consistently unengaged contacts ensuring they still want to hear from you. A reconfirmation campaign is a simple message aimed at specific contacts in your database (i.e. contacts that haven't opened the last three consecutive emails). Sometimes, these are groups that have gotten into your platform through external list imports. Other times, these are your members who've stopped engaging with your communications because they're either fatigued by frequency or turned off by irrelevant content. The reconfirmation message simply asks the unengaged audience if they still want to hear from you and to proactively resubscribe if they, in fact, do want to continue receiving your communications. The message doesn't need to be fancy. In fact it should be simple, straightforward, and clear on the ask to resubscribe.





Double Opt-Ins

To ensure your marketing automation software is only collecting good emails, defined by legitimacy, fit, and interest, it's best practice to install a double opt-in process. This means, prospects filling out your forms and giving you their email addresses will then receive an automated email in their inbox where they can click to verify not only that the email is good but that they want to hear from your organization.

Cleaning Lists

There are a number of reputable data cleaning services available that will quickly generate a report on what are good or risky email addresses in your database. Since databases tend to decay at 22.5% a year, you will want to instill a standard operating procedure of regularly running your data through a data cleaning service for analysis. Once you get the reporting back, don't risk the pool of contacts deemed as unknown and definitely do not send to the risky addresses or bad data. These tend to contain spam traps and other issues that will hurt your reputation, and by extension, the entire sending ecosystem of your marketing automation platform.

Leveraging Traditional Email Marketing Platforms for Member-Based Emails

Embrace the difference between how a marketing automation tool serves you and your organization's goals versus that of a traditional email marketing platform. Since, you still have bulk member emails that need to go out whether members are engaging with your content or not (i.e. member welcome emails, member renewal emails, newsletters, etc.), no one is going to stop you from sending out those messages from a traditional email tool. Enlist a two-tool approach and standard operating procedures for what messaging goes out of which. After time, you'll start to find that you're nurturing the entire member lifecycle from these two connected tools, starting from a lead, then converting to a member, then upselling and engaging based on particular behaviors, interests, and activities.

Always Have "Suppress Unengaged" Button Checked

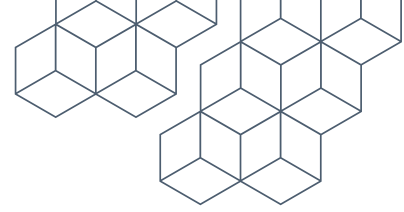
You have the option to uncheck the button that will suppress unengaged contacts in your database in SharpSpring, but you should respect that SharpSpring is trying to work on your behalf by disqualifying old or unengaged contacts. To stay in good sending status in the tool, you are going to need to leave that button unchecked.

What happens if You Continue Reaching Out to Unengaged Audiences

Delivery issues

-  Delivery numbers decrease considerably given the inherent design of marketing automation tools intended to focus on the consistently engaged.
-  After time, if you're sending to the consistently unengaged, you'll start getting a bad sending reputation and your recipients IPs will start to block your sends without you knowing it.





Why this is problematic for associations

- 📦 Associations typically have issues with this because their members are paying for the communications they receive, which may include editorial content, intellectual capital (white papers), industry news, organizational news, program update, volunteer/speaking opportunities, member discounts, etc.
- 📦 Why this differs from for-profits
 - As part of their membership promise and the intangible “product” that is membership, associations require higher delivery and deliverability rates compared to their for-profit counterparts

What Will Happen With a Bad Sending Reputation

- 📦 Reporting may look good on screen, but your messages will start to get blocked by your recipients' IP without you knowing it
- 📦 SharpSpring compliance will step in and restrict your sending status until you implement a sustainable remediation plan (also outlined in this guide).
- 📦 Unless your members tell you, you may not know that your emails aren't going through until your sales numbers are impacted.

