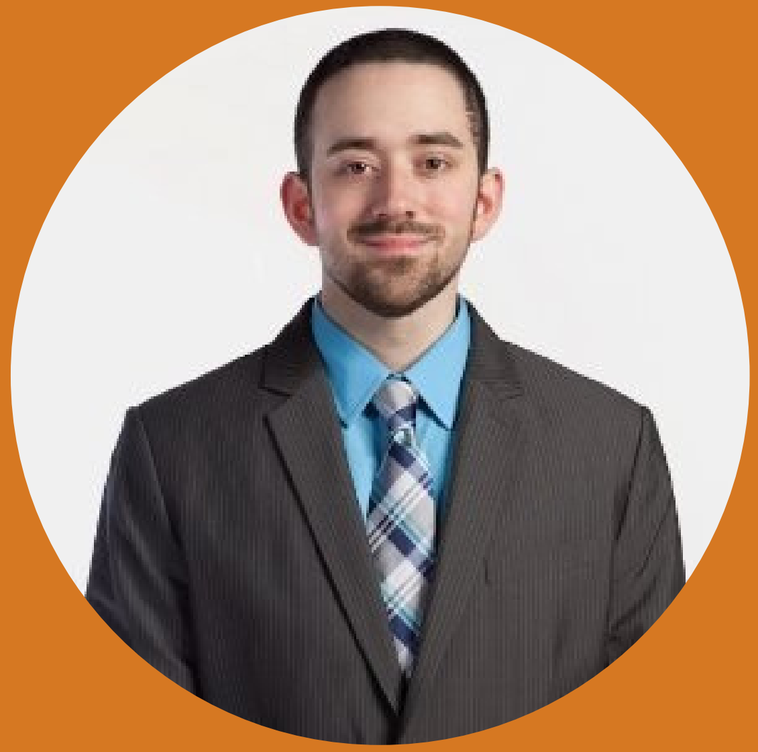
WORK SMARTER, NOT HARDER

HOW TO SCALE YOUR ASSOCIATION'S MARKETING AND SALES EFFORTS WITH LESS

READY NORTH | aiim

Meet Your Presenters

Madison Filipiak
Senior Consultant
Ready North



Tony Paille
Former Chief Marketing Officer
AIIM

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Top Challenges for Associations

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What are some of the **biggest challenges** your marketing, growth, and member retention departments face today?

MARKETING & MEMBER GROWTH'S

Top Challenges

Limited resources

MARKETING & MEMBER GROWTH'S

Top Challenges

- Limited resources
- Changing member needs

MARKETING & MEMBER GROWTH'S

Top Challenges

- Limited resources
- Changing member needs
- Competition for attention

MARKETING & MEMBER GROWTH'S

Top Challenges

- Limited resources
- Changing member needs
- Competition for attention
- Lack of personalization

How you can use a comprehensive CRM to save time and resources

WHAT IS

HubSpot?

Founded in 2006, HubSpot is a developer and marketer of software products for inbound marketing, sales, and customer service.

The HubSpot CRM consists of five platforms:

- Marketing Hub
- Sales Hub
- Service Hub
- CMS Hub
- Operations Hub

DEFINE YOUR

Target Personas

Semi-fictional representations of your ideal user based on real data and educated speculation. They help you understand your users' pain points, goals, preferred communication channels, and messages that resonate with them.

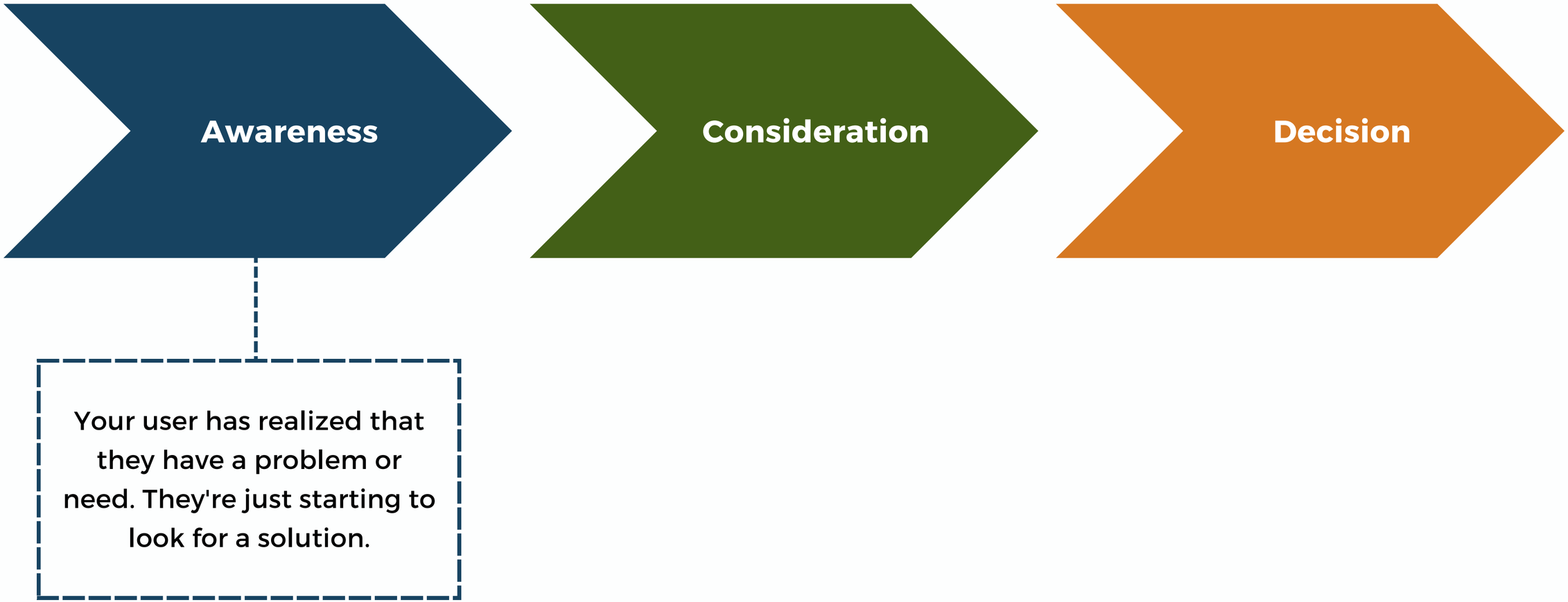
- Look at your data
- Talk to your sales and customer service teams
- Interview your existing users

Understand

YOUR USER'S JOURNEY

Understand

YOUR USER'S JOURNEY



Understand

YOUR USER'S JOURNEY

Awareness

Your user has realized that they have a problem or need. They're just starting to look for a solution.

Consideration

Your user has clearly defined their problem and has committed to finding a solution.

Decision

Understand

YOUR USER'S JOURNEY

Awareness

Your user has realized that they have a problem or need. They're just starting to look for a solution.

Consideration

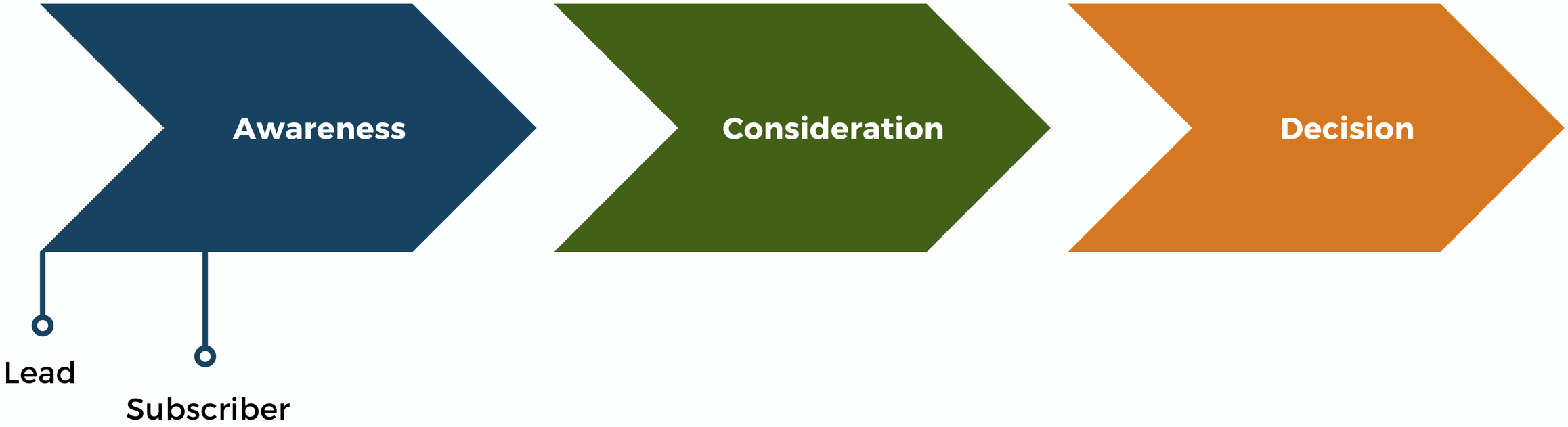
Your user has clearly defined their problem and has committed to finding a solution.

Decision

Your user has compiled a list of solutions and is ready to make a final decision.

Track Users

WITH LIFECYCLE STAGES



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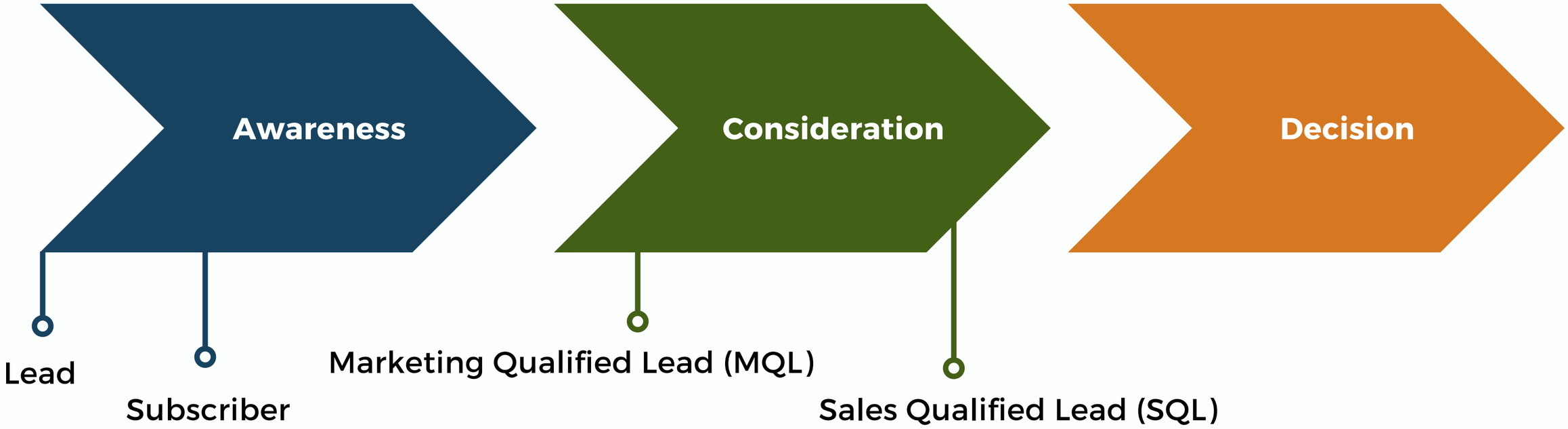

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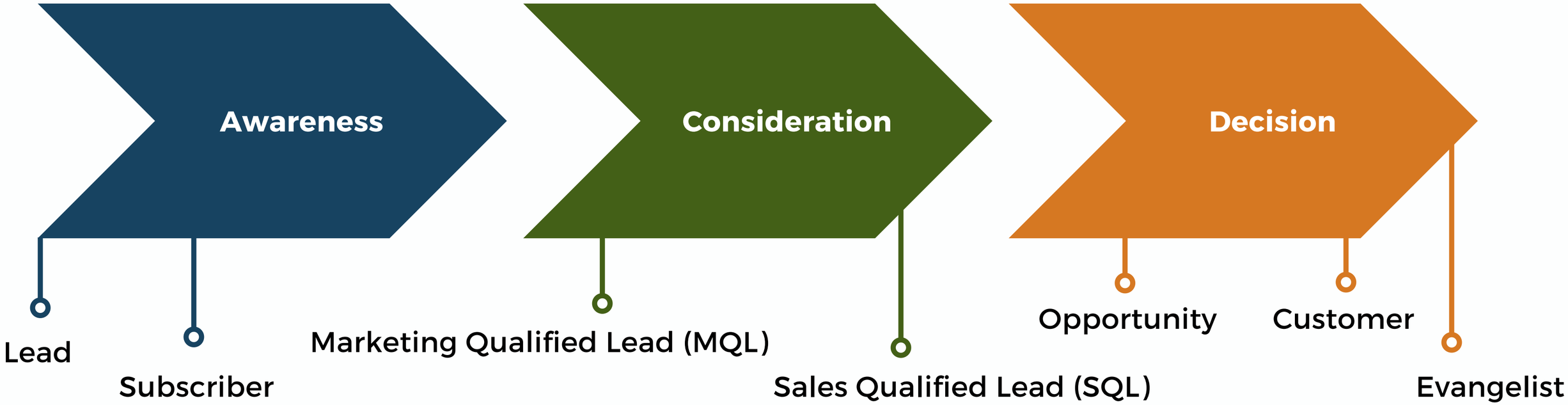
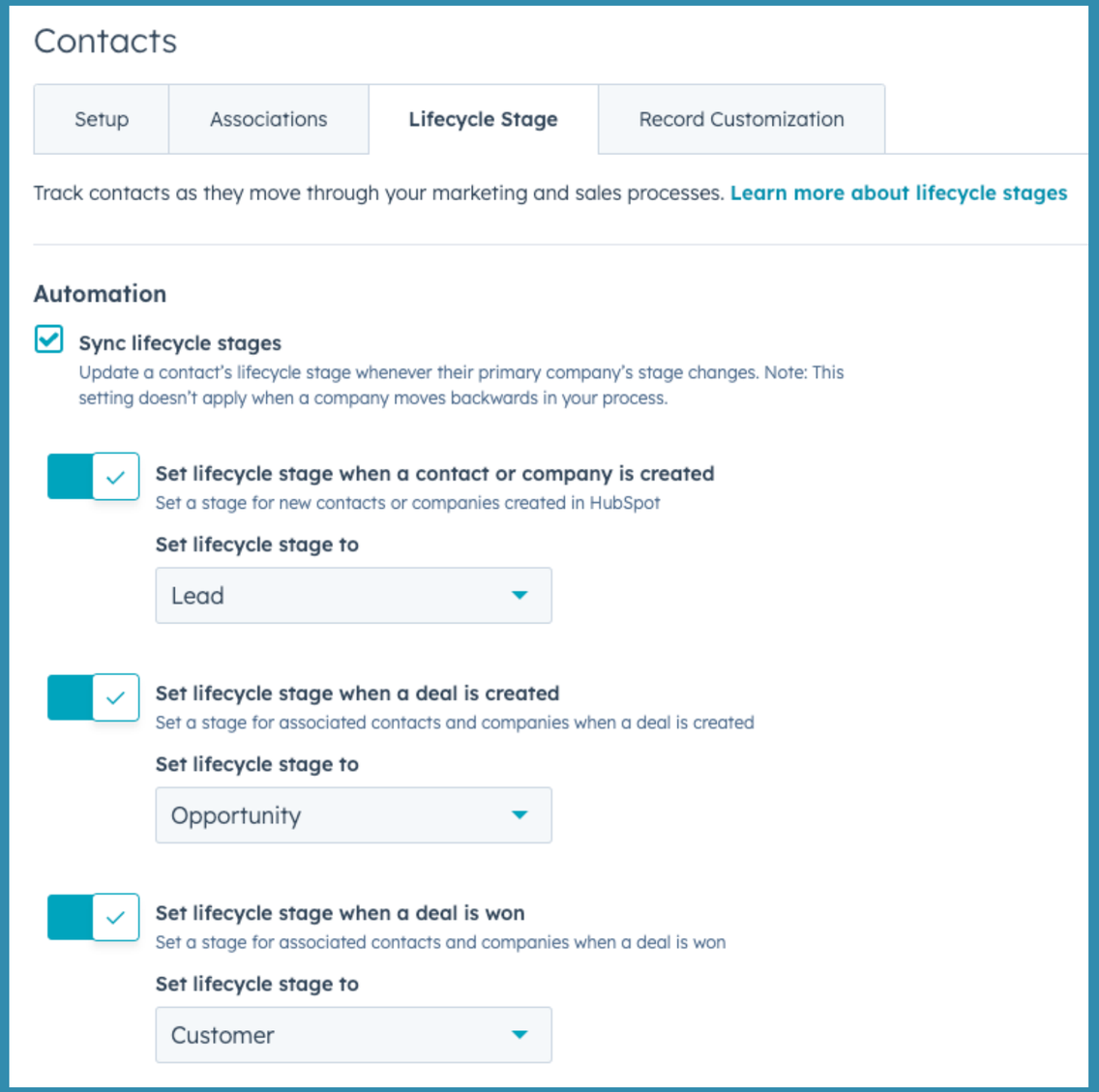
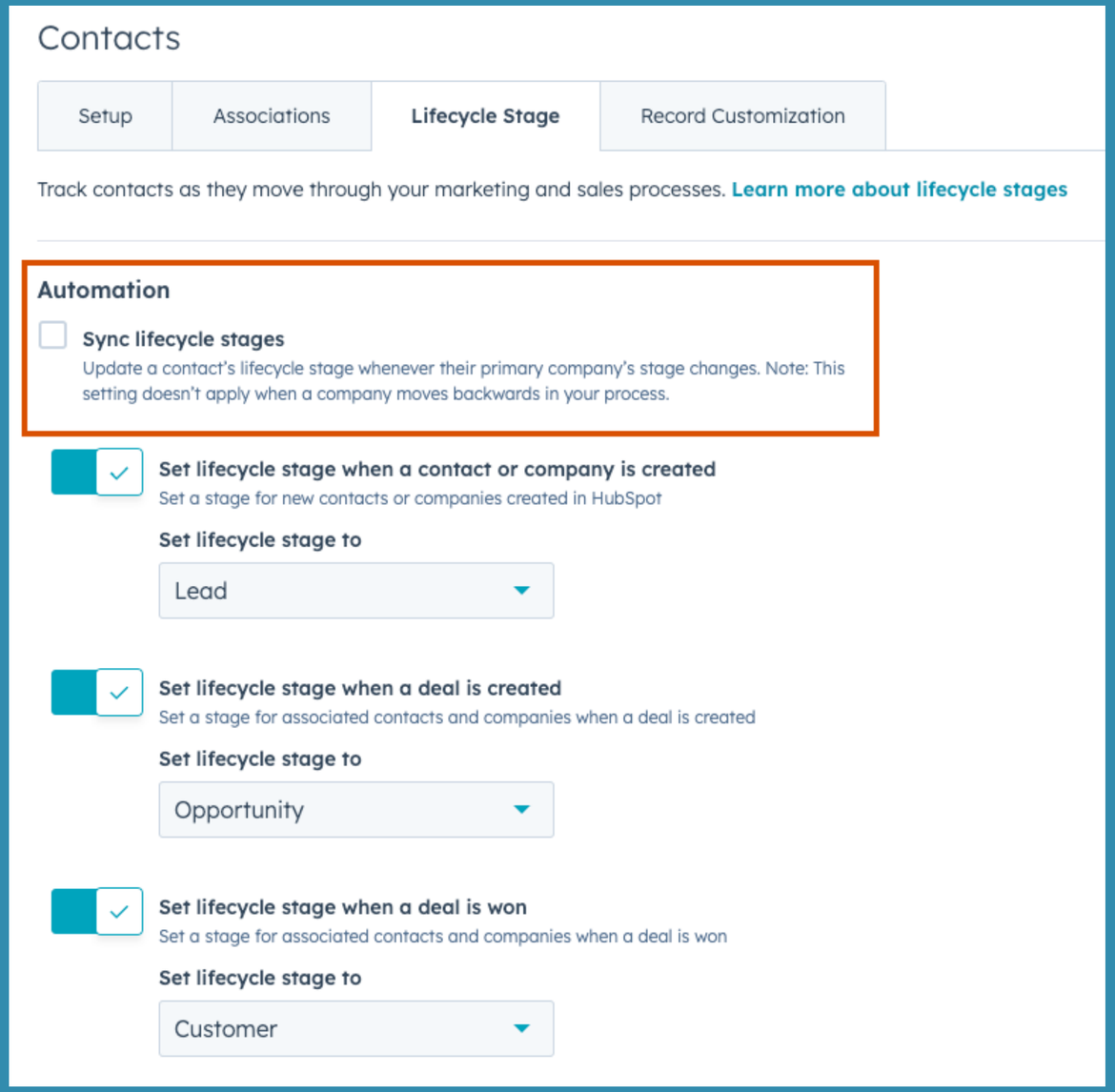




HOW TO AUTOMATE

Lifecycle Changes

- Adjust default lifecycle stage settings in Settings.



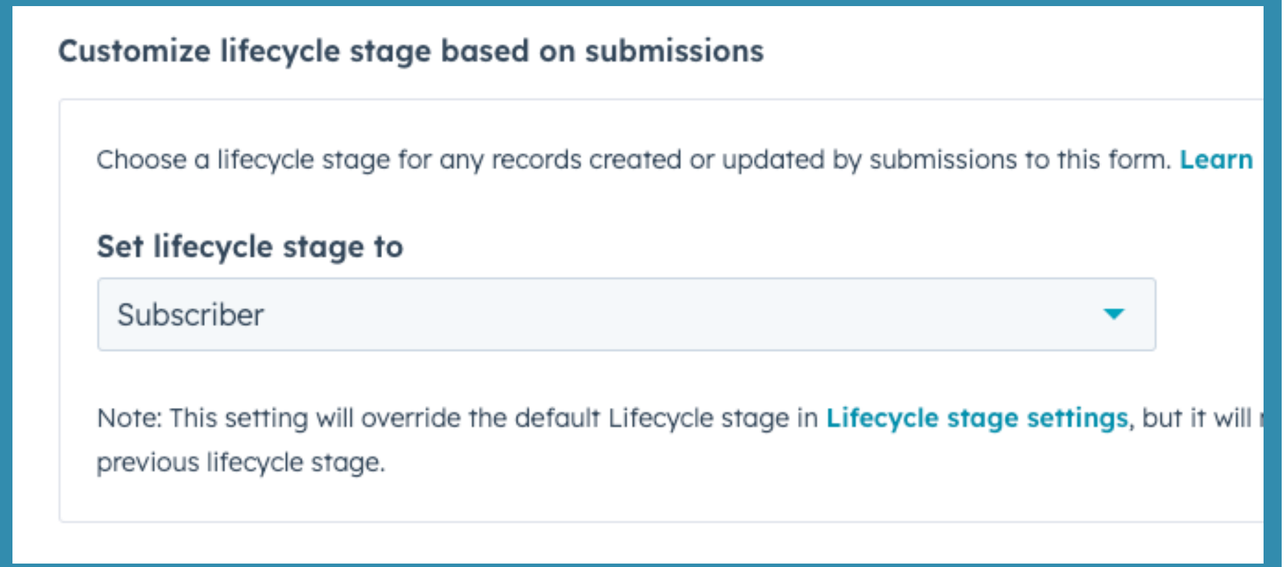
HOW TO AUTOMATE

Lifecycle Changes

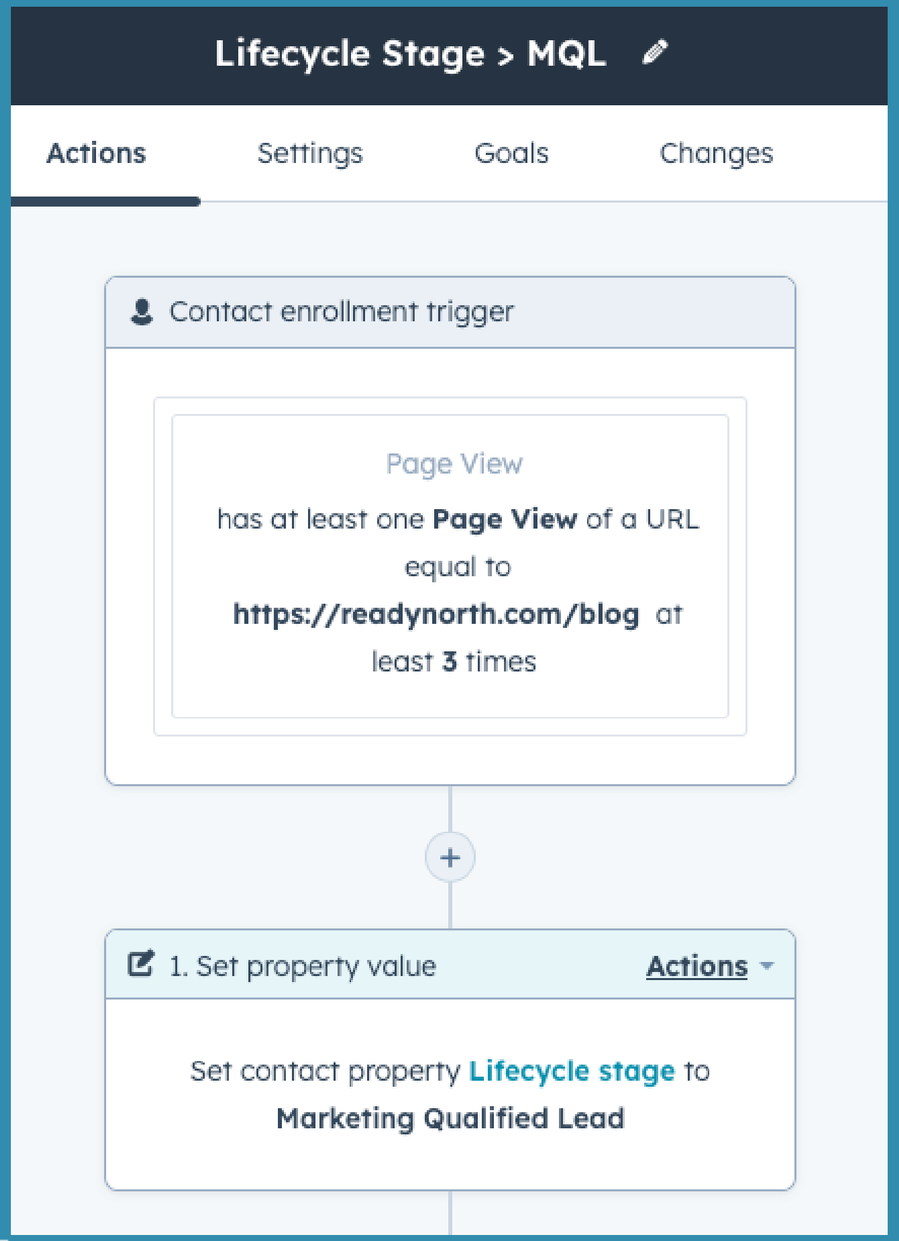
- Adjust default lifecycle stage settings in Settings.
- Set and sync lifecycle stages between objects.

HOW TO AUTOMATE

Lifecycle Changes



- Adjust default lifecycle stage settings in Settings.
- Set and sync lifecycle stages between objects.
- Automatically set lifecycle stage through form settings.



HOW TO AUTOMATE

Lifecycle Changes

- Adjust default lifecycle stage settings in Settings.
- Set and sync lifecycle stages between objects.
- Automatically set lifecycle stage through form settings.
- Bulk edit lifecycle stage using a workflow.

71% of consumers **expect companies to deliver personalized interactions**. And 76% get frustrated when this doesn't happen.

15
JUN

The Power of Personalization: Tips and Tricks for Driving Member Participation and Retention

Create Optimized Content

FOR EACH STAGE OF THE JOURNEY

Combine what you know about your target personas with keyword research to create the right content for each step of their journey.

Awareness
(Lead / Subscriber)

- Blog posts
- Social media shares
- White papers
- Ebooks
- Videos

15 JUN

The Power of Personalization: Tips and Tricks for Driving Member Participation and Retention

Create Optimized Content

FOR EACH STAGE OF THE JOURNEY

Combine what you know about your target personas with keyword research to create the right content for each step of their journey.

Consideration (MQLs / SQLs)

- Comparison guides
- Success stories
- Member testimonials
- Webinars
- Pros and cons articles

15 JUN

The Power of Personalization: Tips and Tricks for Driving Member Participation and Retention

Create Optimized Content

FOR EACH STAGE OF THE JOURNEY

Combine what you know about your target personas with keyword research to create the right content for each step of their journey.

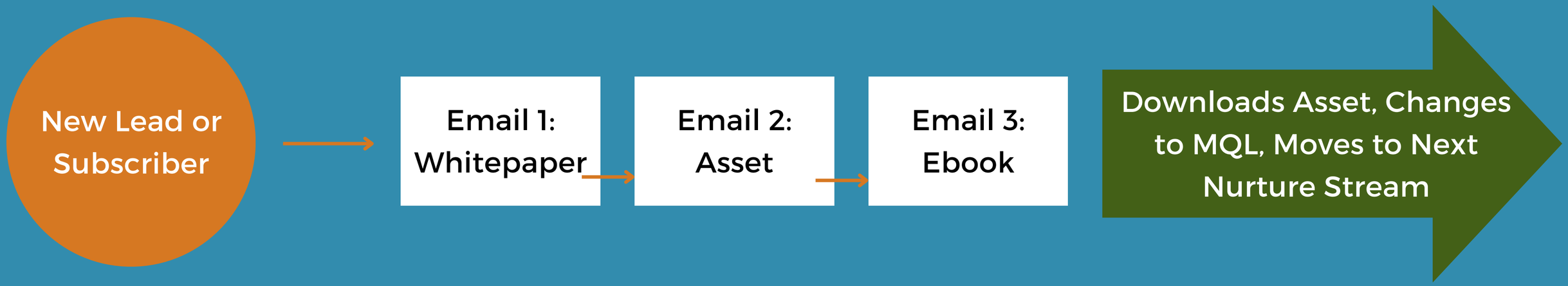
Decision
(Opp, Customer, Evang)

- Membership renewal
- Member communities
- Forums
- Free trials
- Referral programs

If you have a sales pipeline, a longer sales cycle, or you're looking to add value to your prospects, **a good sales nurture series** will significantly increase your conversion rates.

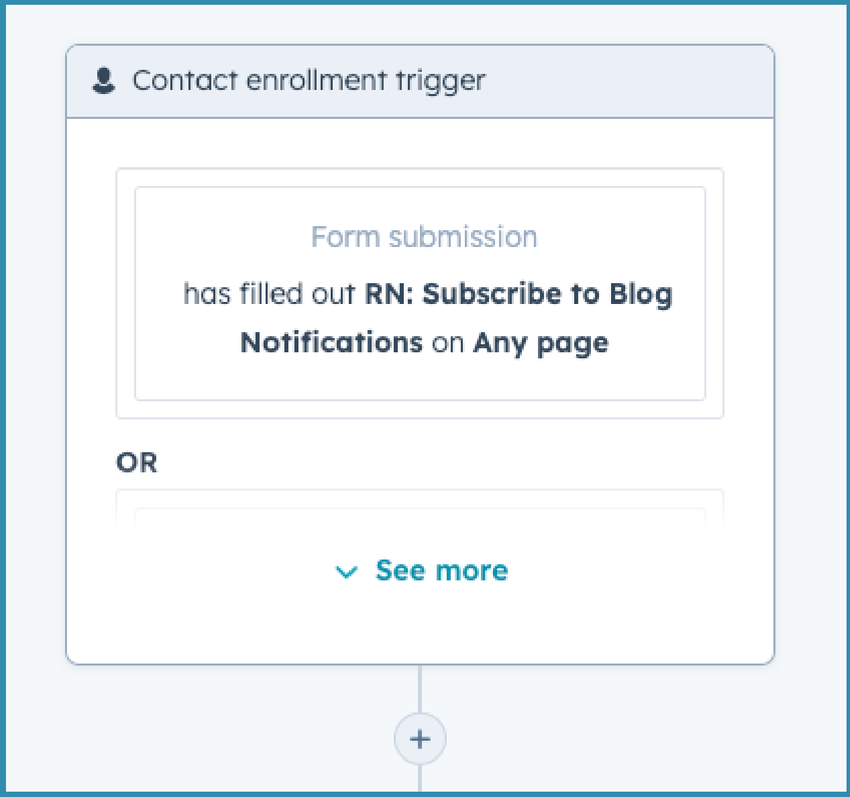
Nurture Leads

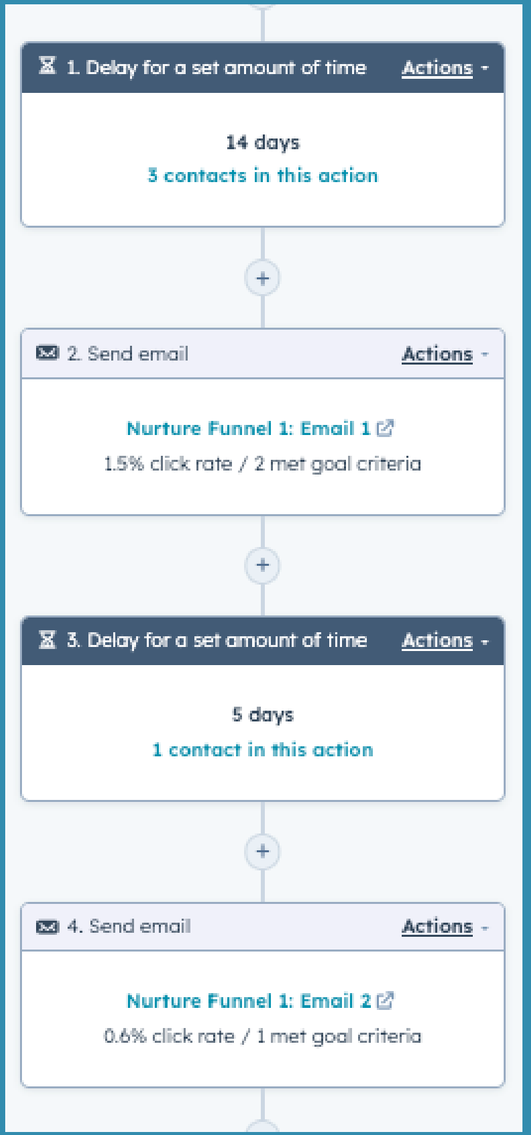
USING WORKFLOWS

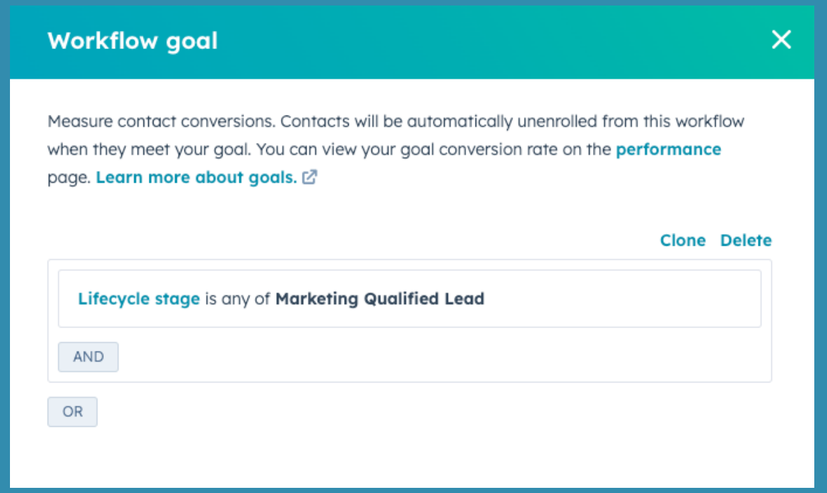


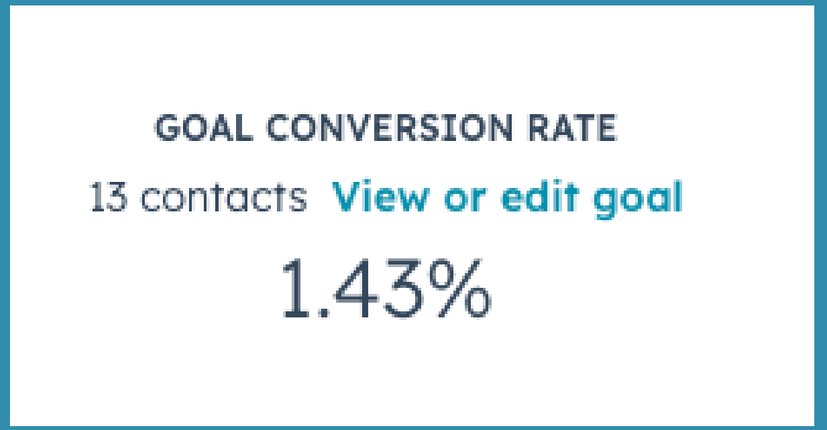
Nurture Leads

USING WORKFLOWS









PASS QUALIFIED LEADS WITH

Lead Scoring & Lifecycle Stages

LEAD SCORING / HUBSPOT SCORE

- A method used to determine the worthiness of a lead.
- Includes implicit factors like webinar attendance or page views.
- Includes explicit factors like job title and company name.

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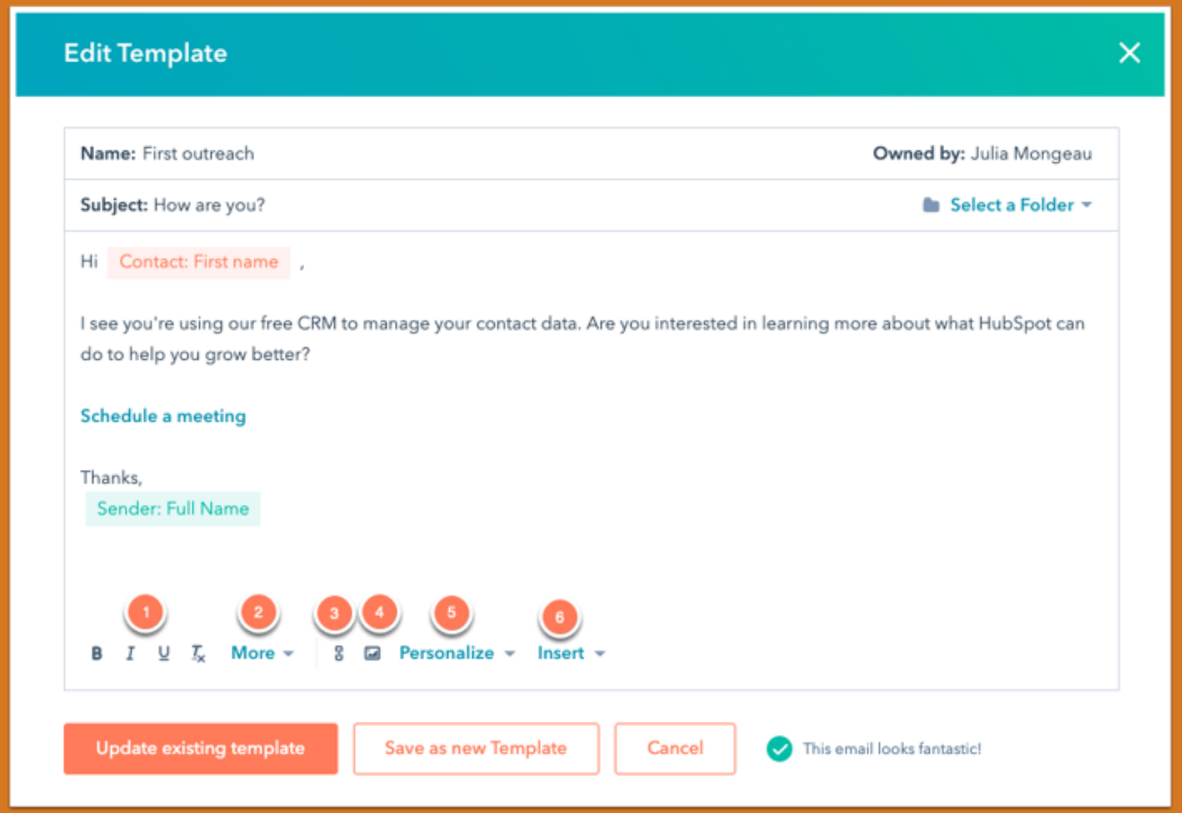
COMBINING LIFECYCLE STAGE + LEAD SCORE

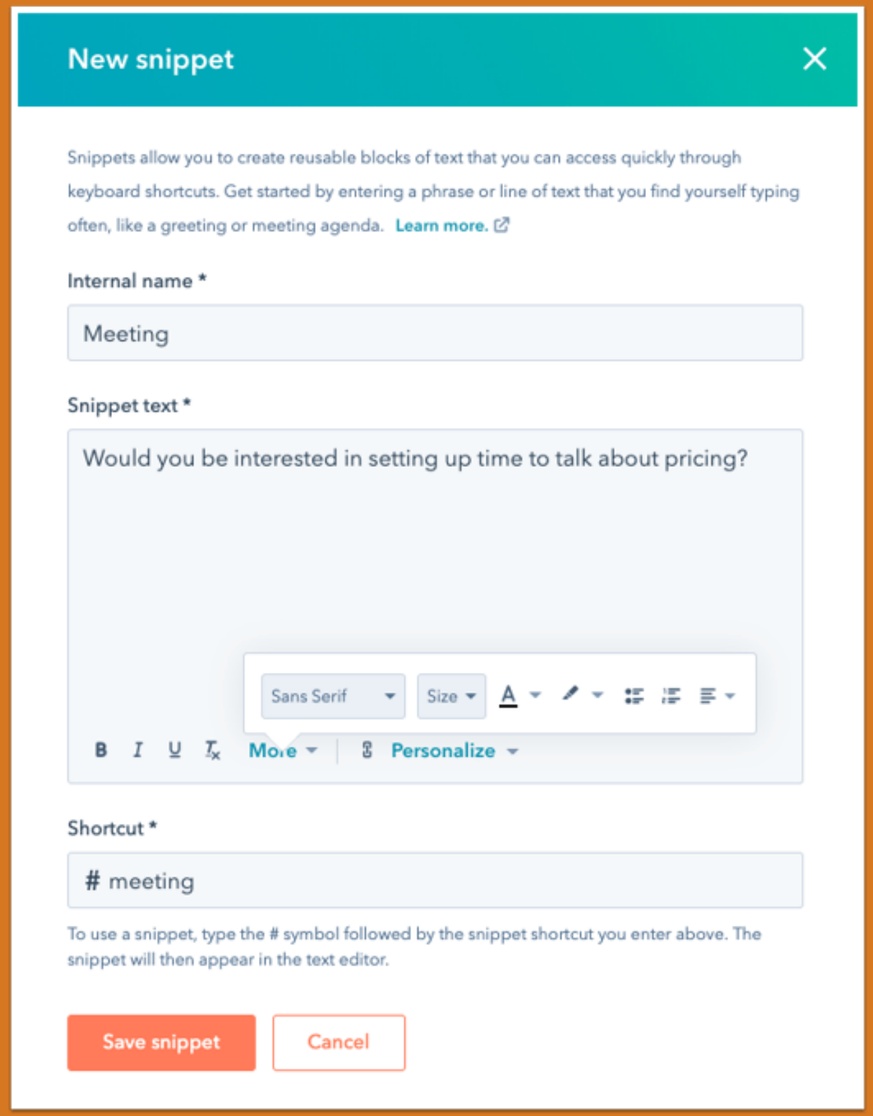
- Create lists, filtering contacts by lifecycle stage.
- Sort your list by lead score to prioritize outreach.
- Saves time and money



IMPROVE 1:1 OUTREACH WITH

TEMPLATES

- Sales email templates
- Snippets
- Sequences



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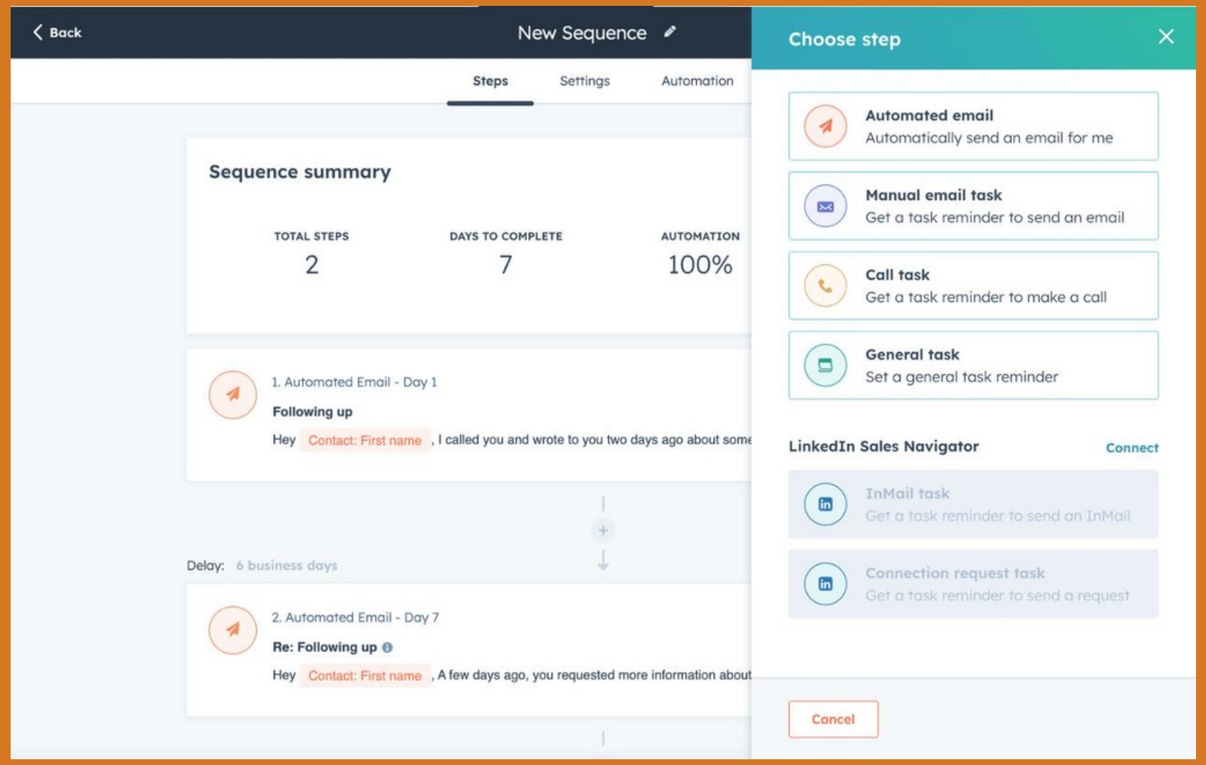

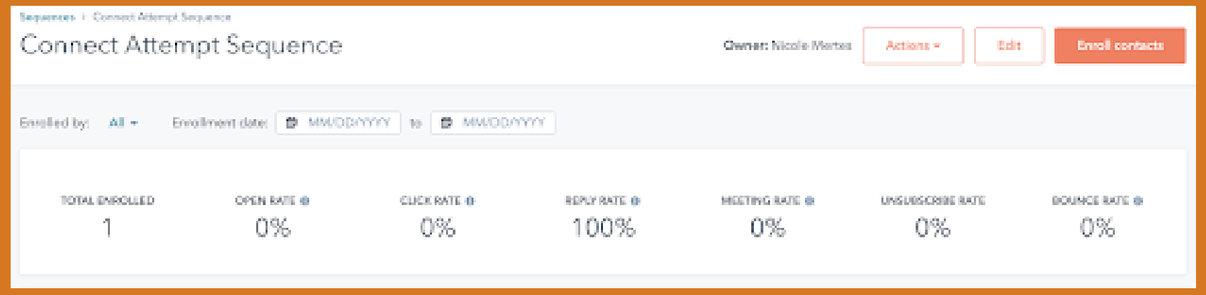

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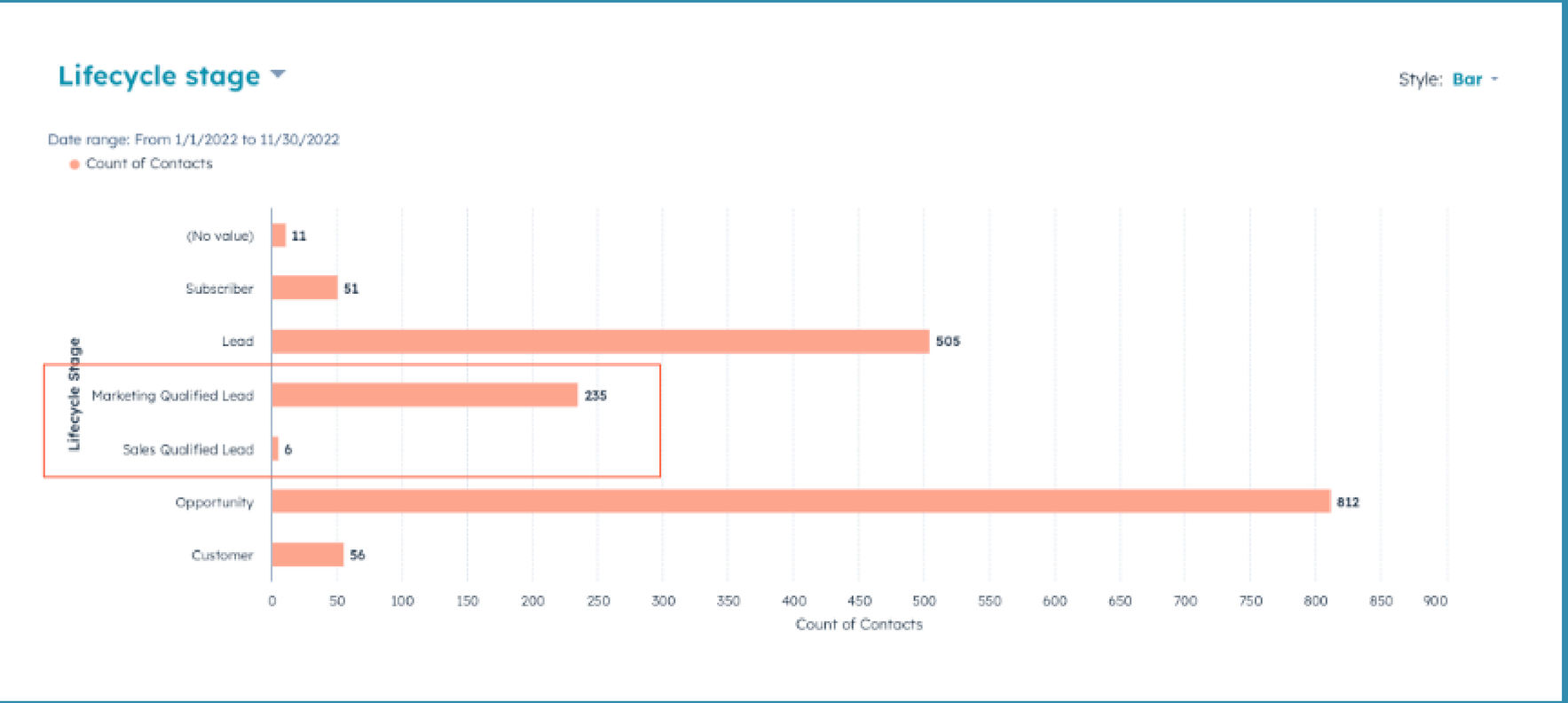
Use Reports

TO IDENTIFY GAPS OR BOTTLENECKS



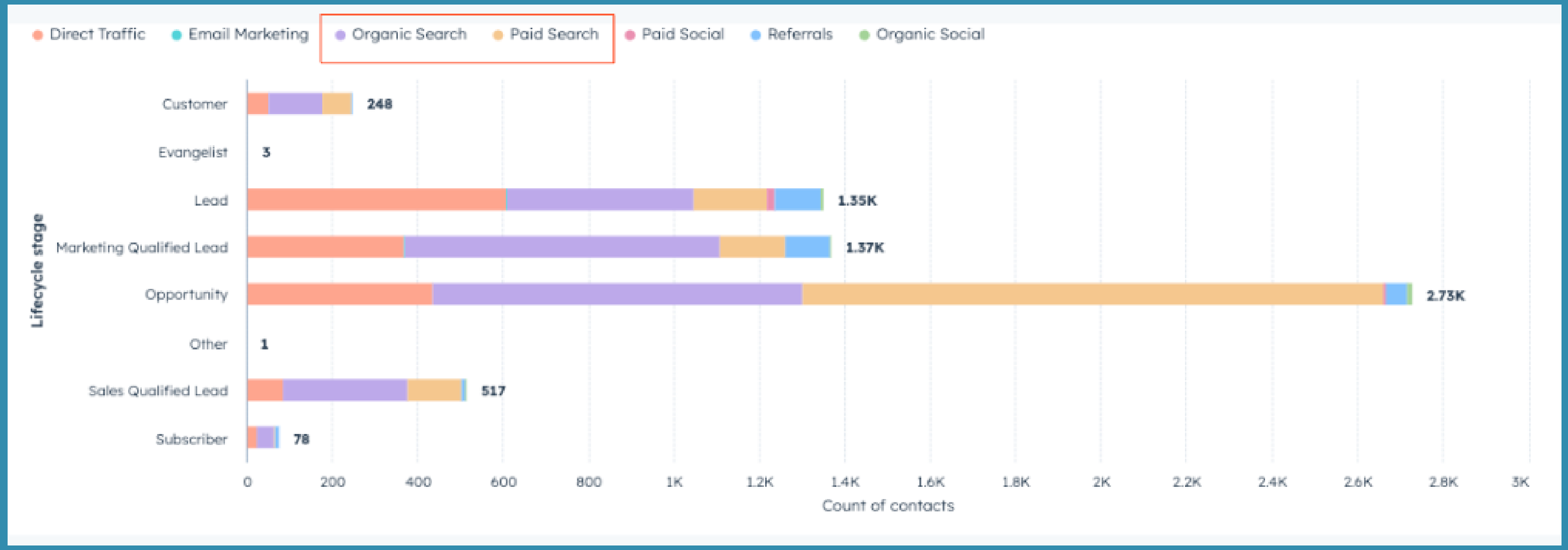
Use Reports

TO IDENTIFY GAPS OR BOTTLENECKS

- Do you have an MQL nurture stream set up?
- Are there ample opportunities for someone to contact your team or become a member/sponsor?
- What does your marketing to sales handoff look like?
- How busy is your sales/membership team?

Use Reports

TO PLAN MARKETING INITIATIVES



How the Association for Intelligent Information Management Used HubSpot to Save Time & Resources

Create Content Across the Entire Buyer's Journey

1. Call-to-Action
2. Landing Page
3. Thank You Page

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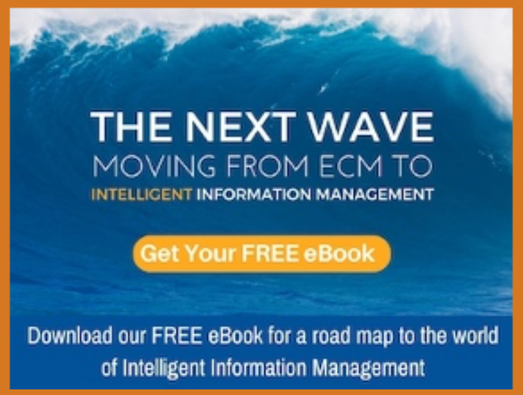
The Conversion Process

Call-to-Action



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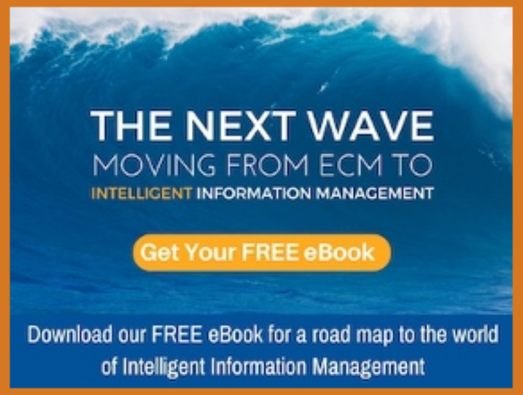
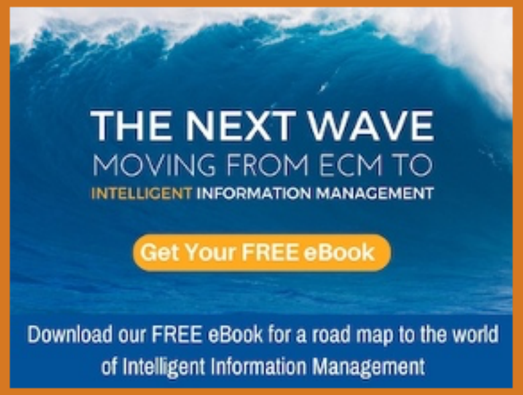


Landing Page

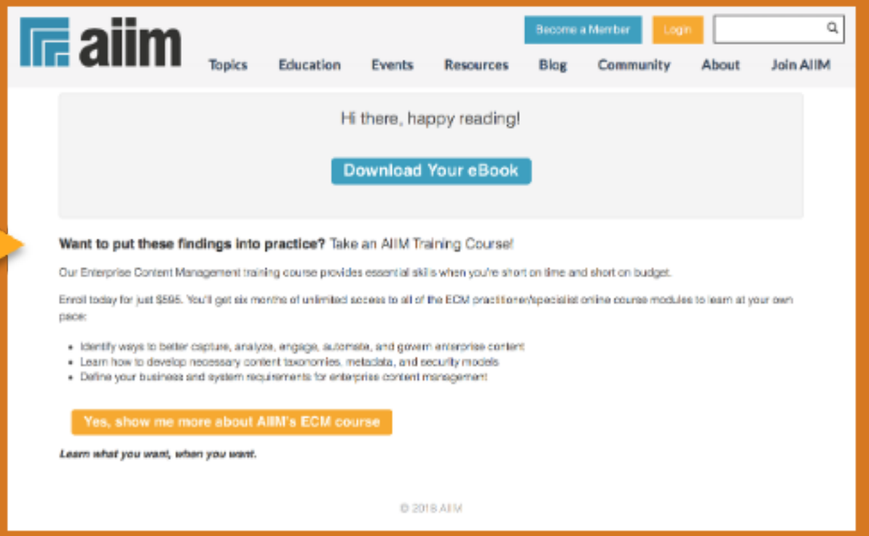
The Conversion Process

Call-to-Action



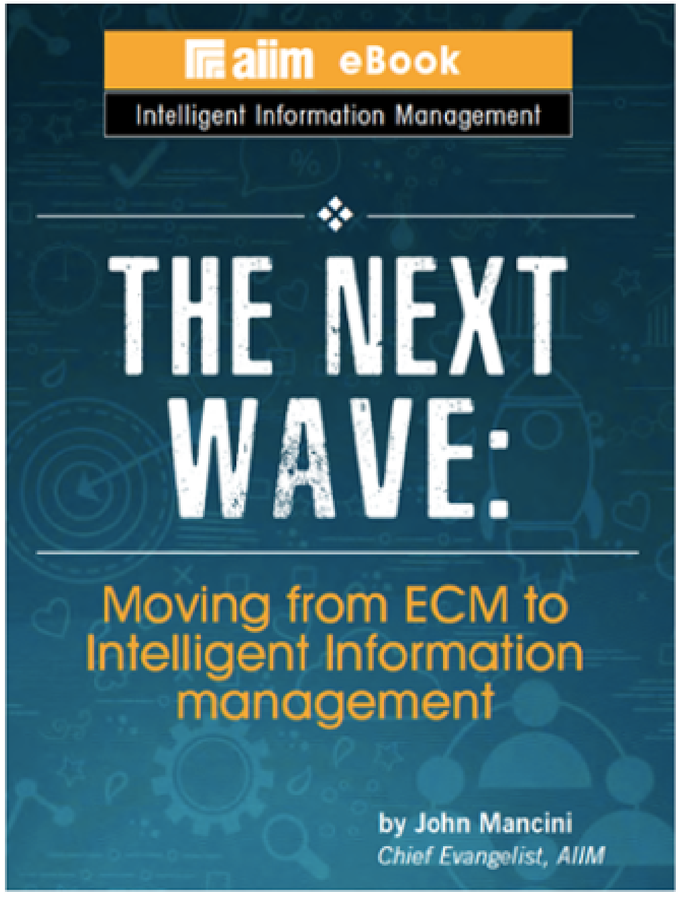
Landing Page

Thank You Page



Is ECM Really Dead? We Think It's a Bit More Complicated

A Free eBook from AIIM



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Gartner: "ECM is now dead (kaput, finite, an ex-market name), at least in how Gartner defines the market. It's been replaced by the term Content Services."

So is "Content Services" really all there is? Is "ECM" really dead? The *term* might be straining a bit, but the *idea* isn't. We think the conversation is a bit more complicated (and to be fair, so does Gartner).

So what comes next? Find out more in our new eBook, ***THE NEXT WAVE: Moving from ECM to Intelligent Information Management.***

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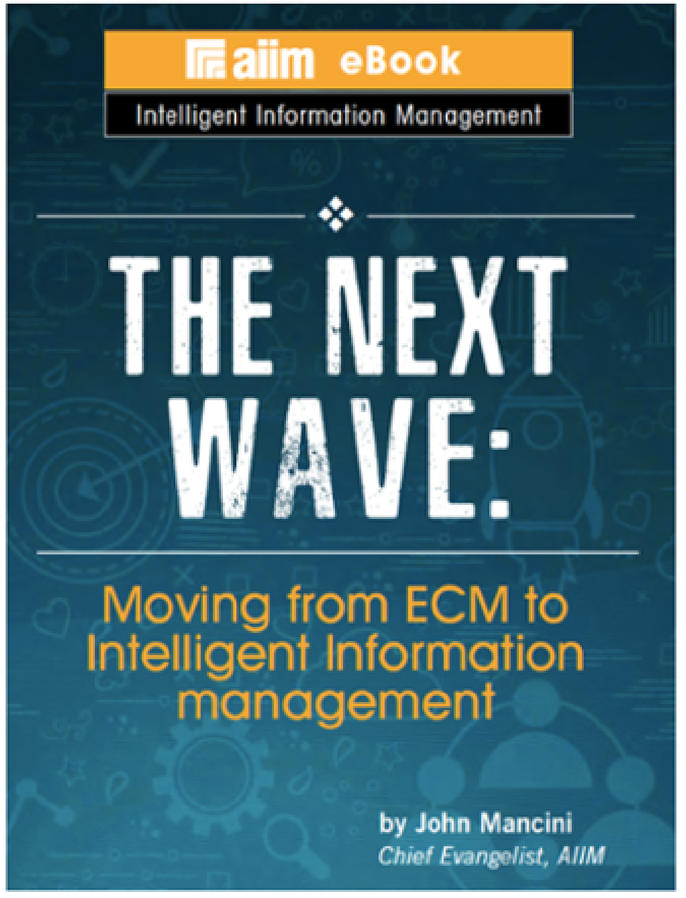

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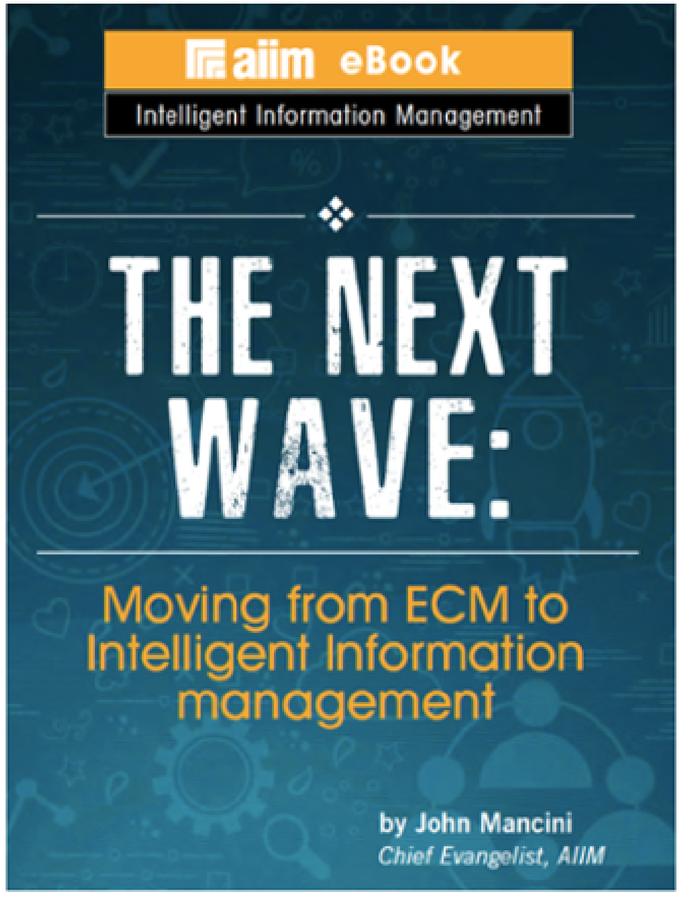

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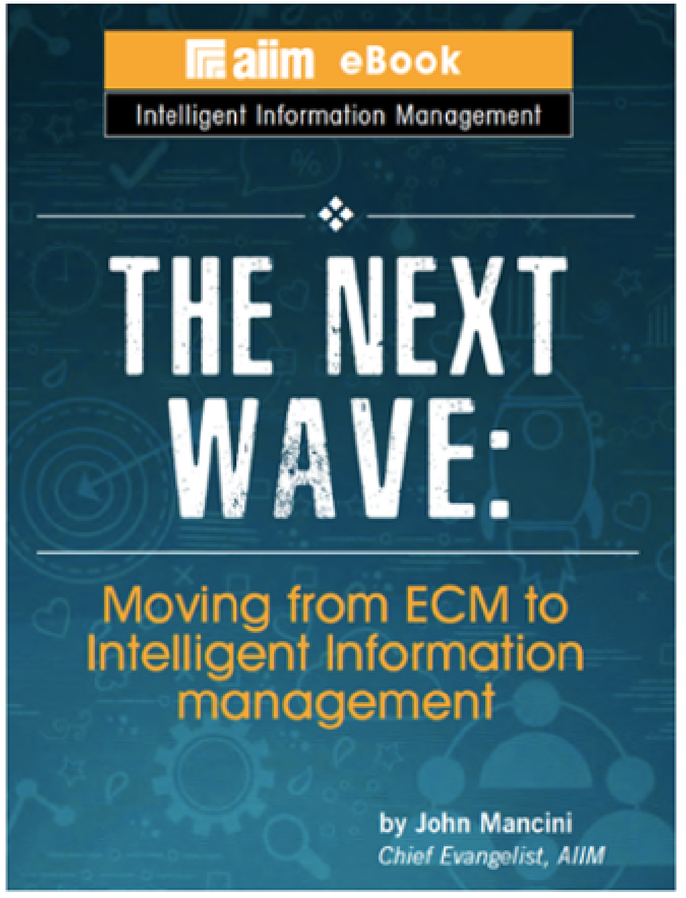

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Want to put these findings into practice? Take an AIIM Training Course!

Our Enterprise Content Management training course provides essential skills when you're short on time and short on budget.

Enroll today for just $595. You'll get six months of unlimited access to all of the ECM practitioner/specialist online course modules to learn at your own pace:

- Identify ways to better capture, analyze, engage, automate, and govern enterprise content
- Learn how to develop necessary content taxonomies, metadata, and security models
- Define your business and system requirements for enterprise content management

Yes, show me more about AIIM's ECM course

Learn what you want, when you want.

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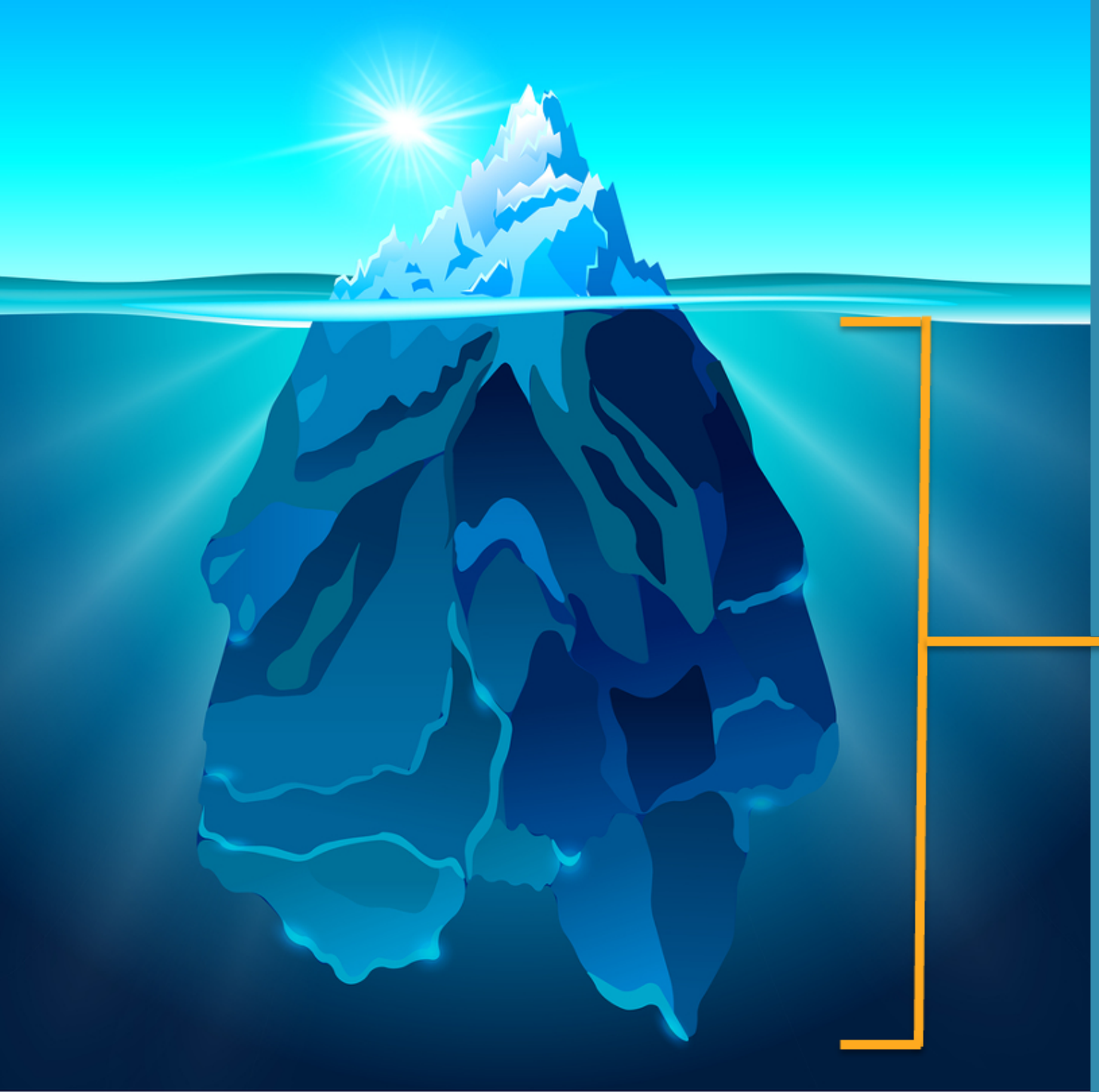
4,511 downloads

868 new contacts

29 new customers



Idea generation

Research

Organizing data

Designing or writing the asset

Designing or writing the asset

We Start With an eBook

eBook

We Start With an eBook

eBook

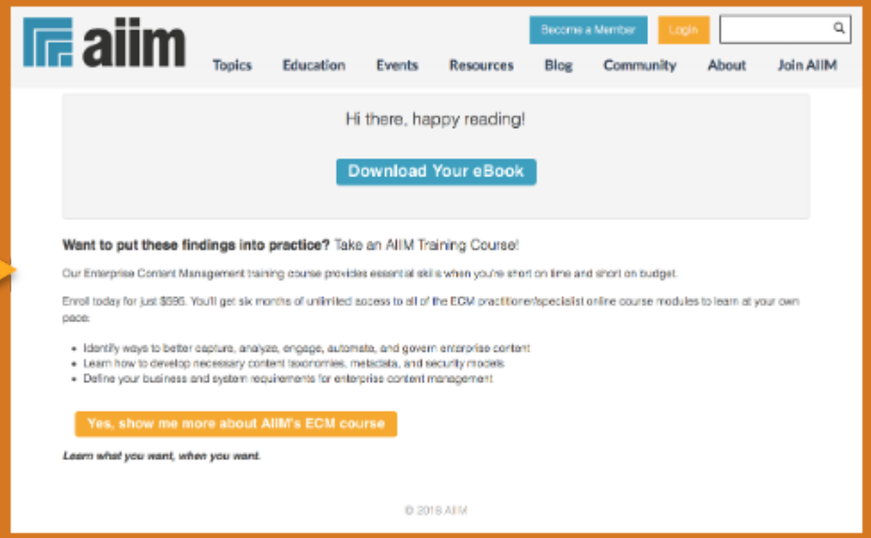
Landing Page

We Start With an eBook

eBook

Landing Page

Thank You Page

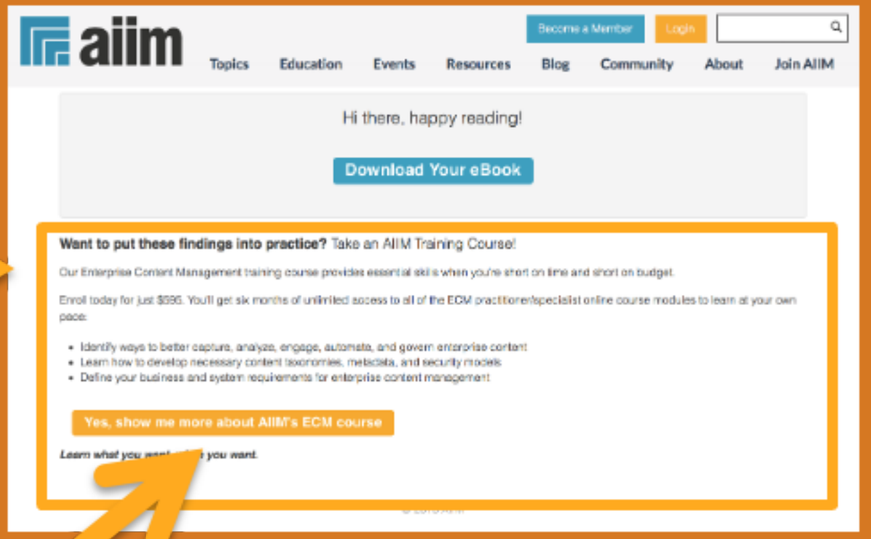


We Start With an eBook

eBook

Landing Page

Thank You Page

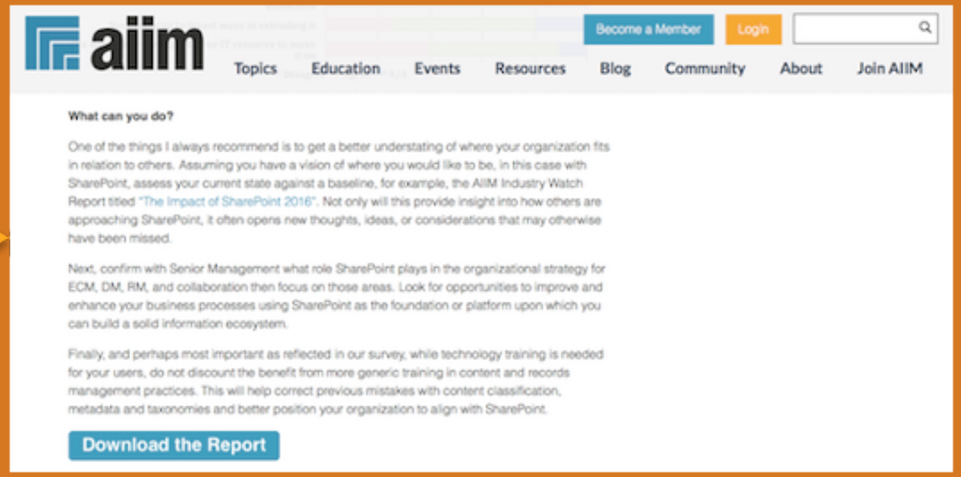


Next Step

Next, We Wrote a Blog Post

Article

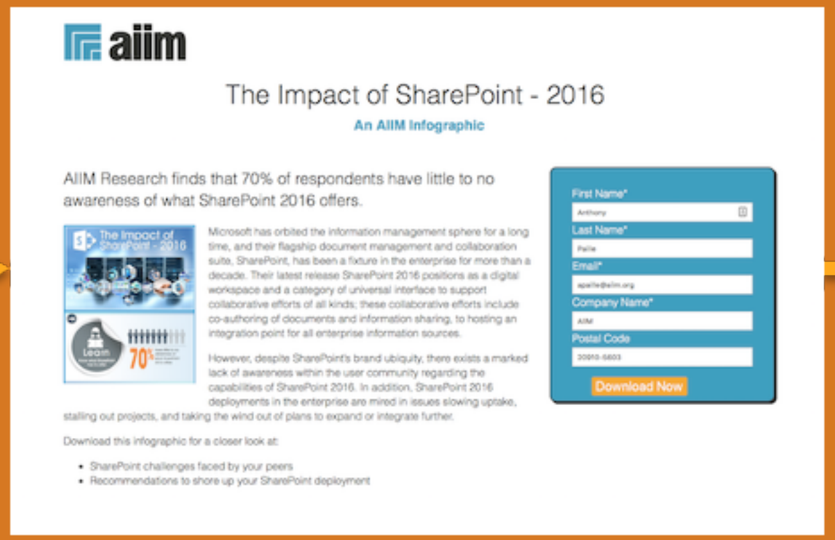
Call-to-Action



Then, We Designed an Infographic

Infographic

Landing Page

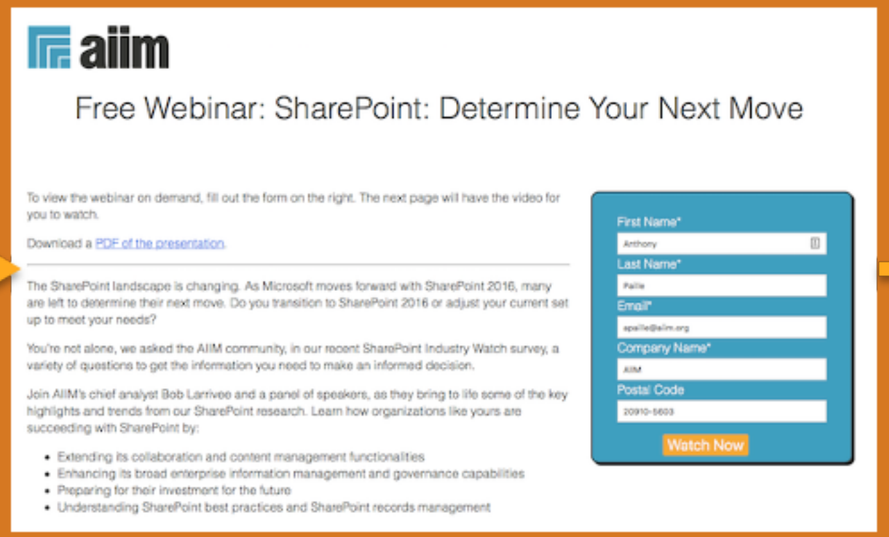


Thank You Page

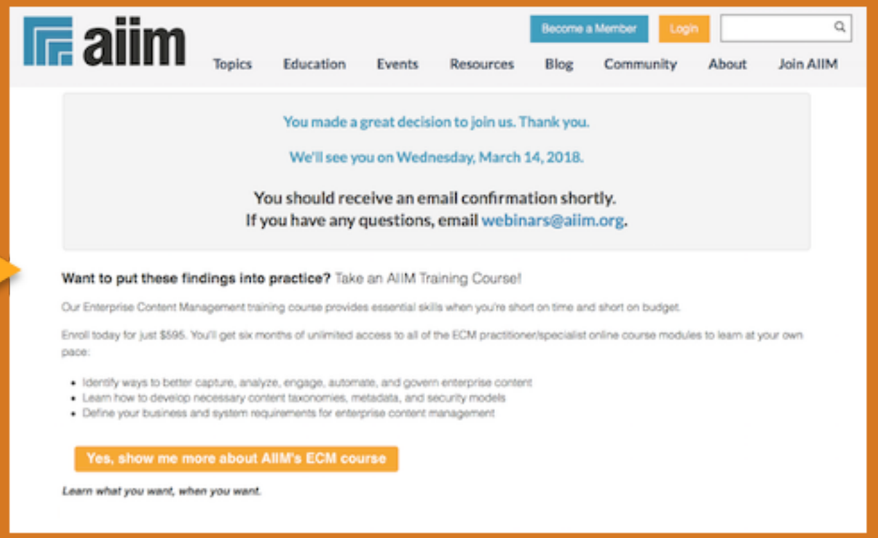
How About a Webinar?

Webinar

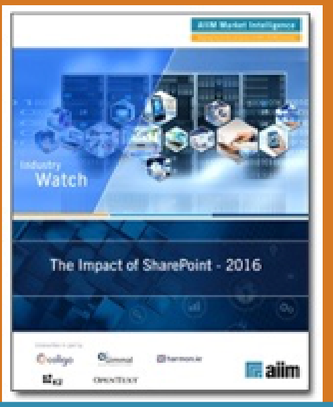
Landing Page



Thank You Page



Finally, a YouTube Video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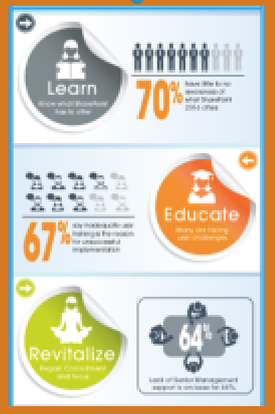
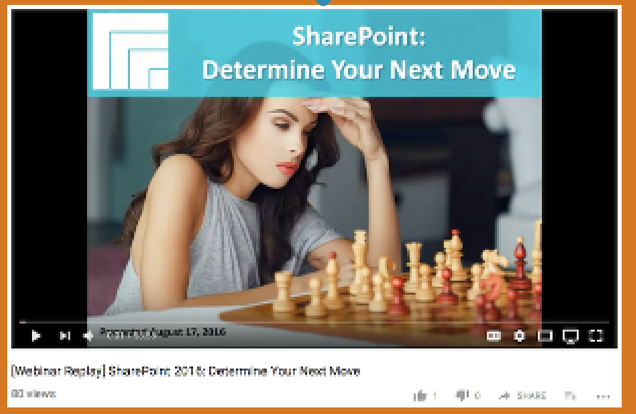

Learn
70%
Educate
67%
Revitalize
64%

SharePoint:
Determine Your Next Move


SharePoint:
Determine Your Next Move
[Webinar Replay] SharePoint 2016: Determine Your Next Move

The Results

Blog Post
782 Views

YouTube Video
116 views

eBook
1,062 downloads
239 new contacts
6 customers

Webinar
591 attendees
167 new contacts
8 customers

Infographic
371 downloads
66 new contacts
4 customers

Totals
2,024 engagements
472 new contacts
18 customers

What Does That Mean in Dollars?

$2,706.03 Average Customer Lifetime Value + 18 Customers = **$48,708.54**

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