Going Beyond the Basics

Bryan Tobin
Training and Usability Manager
SharpSpring

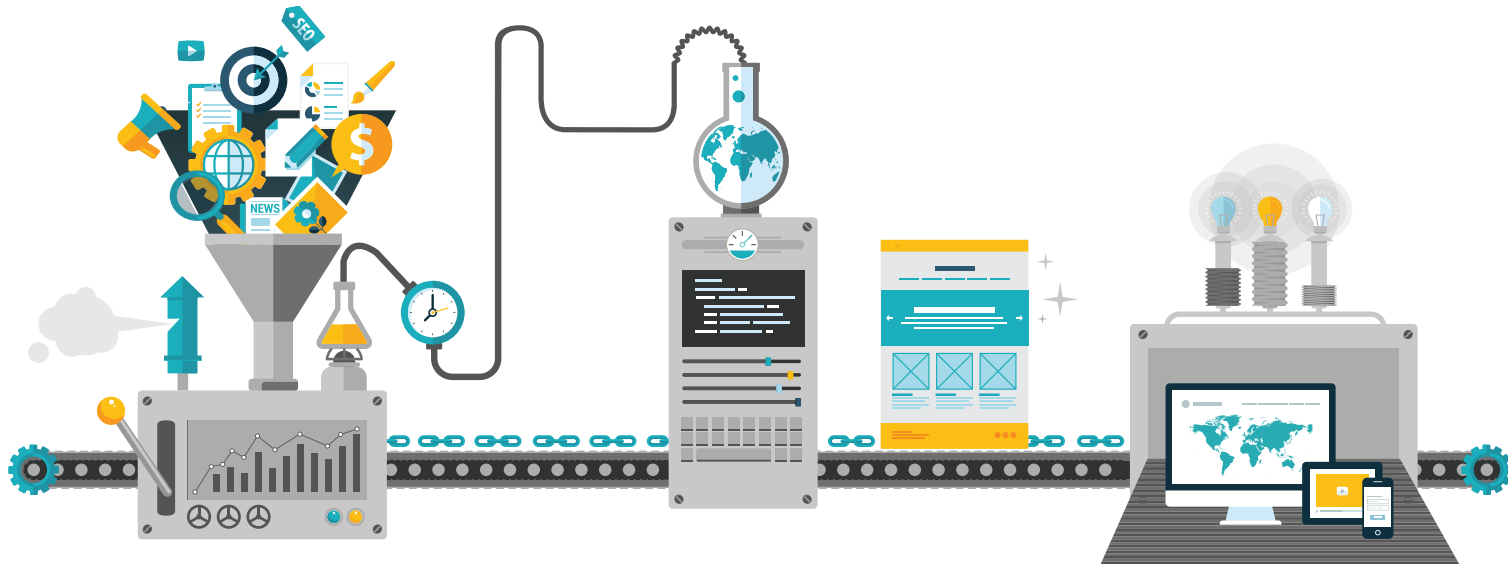**David Schmeltzle**
President
BizBudding Inc.

Greetings

Who's In The Audience

- SharpSpring Partner Agencies

- Agencies Considering SharpSpring

- In-House Marketing Professionals

Why Are We Here?

- Learning from Peers
  - Share marketing best practices
  - Provide real-world success stories
- Today's focus: Exploring features of marketing automation that enhance usage

SharpSpring

Housekeeping

Questions?

- Phone lines are muted
- Submit via:
  - **Chat Box**
  - **Twitter: #SharpTweet or @SharpSpring**

Webinar Recording & Slides

- Emailed after webinar

Webinar Survey

- We need your feedback

Upcoming Webinar

Spring Board Live – Lead Action Tasks & Workflows – Partners Only

November 11th 2016
11 a.m. – 11:30 a.m. EDT
8 a.m. - 8:30 a.m. PDT
4 p.m. - 4:30 p.m. BST

Greg Robinson
Usability Manager
SharpSpring

Future Partner Presenters:
Email Nicole Levy at nicole@sharpspring.com

SharpSpring

Introductions

Bryan Tobin

TRAINING AND USABILITY MANAGER | SharpSpring

As Usability Manager, Bryan is responsible for creating content to help users get the most out of SharpSpring. This includes maintaining the support forum and creating instructional "how to" videos. Working in collaboration with Marketing, Support, and Development, Bryan helps create an exemplary experience for every user.

David Schmeltzle

PRESIDENT | BizBudding Inc

David started his career in software development and quickly learned the importance of integrating technology with business process and marketing. Combined with an analytical focus, this results-oriented approach became the foundation for BizBudding and its clients. BizBudding has been a SharpSpring agency partner for almost two years and sends nearly one million emails a month using SharpSpring.

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BizBudding Inc

- ❏ marketing automation
  - ❏ Silver SharpSpring Partner - 2 years
- ❏ web development / design
  - ❏ Big Sites: 11 million site visitors, 90+ franchise locations, 58k+ people on site at one time, 15 million monthly page views
  - ❏ Smaller Sites: build websites tightly integrated with SharpSpring; making it easy for our clients to update content and automation
- ❏ marketing analytics
  - ❏ SEO/SEM
  - ❏ Content Strategy & Content Development

- ❏ Membership Sites
- ❏ Franchise Location Management
- ❏ Wholesale & Retail Sites (combined too)
- ❏ Data Driven Dynamic Sites
- ❏ Product Launch Sites

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Going Beyond the Basics

Diving deeper into SharpSpring
to multiply your results.

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Poll

Today's discussion centers around:

Powerful Features ☑

- Media Center Analytics
- Workflow Conversion Analytics
- API Integration
- Automation Tasks
- Email Tagging

Email Deliverability ◹

- Email Deliverability Optimization
- Email Design Optimization
- Render Tests
- Email Analytics
- List Segmentation

Case Studies 🔍

- Click through rates increase over 28%
- Email Management
- Pipeline Management
- Forms Management

#SharpTweet live with us

Powerful Features

Understand how these features work and then learn your customer's business process.

The key is to help a business implement these features as they grow.

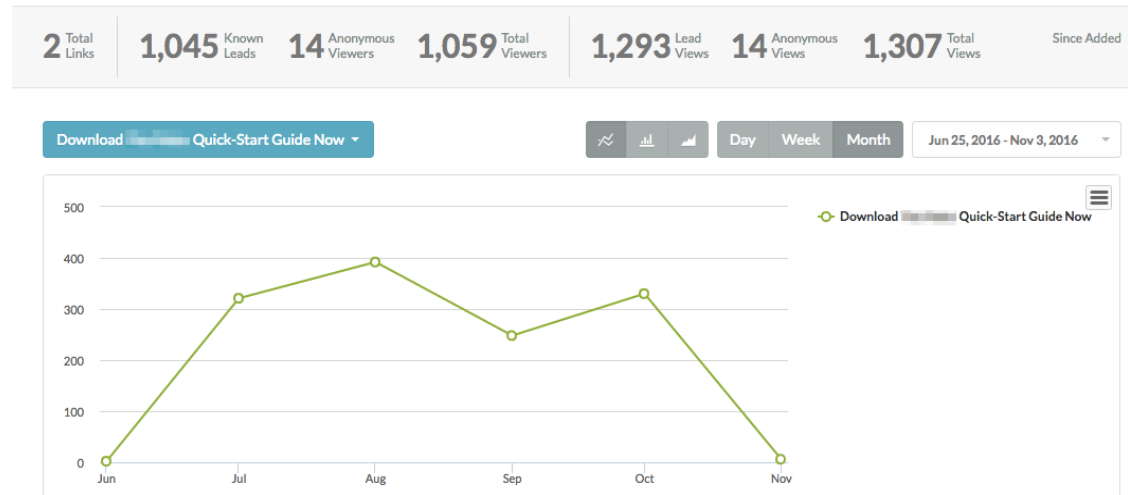You don't have to implement these all at once.

Powerful Features | Media Center Analytics

Content | Media Center

Create trackable media that can be used in Emails, Automation Tasks, Notifications and Workflows.

Create a new link for each campaign or tracking source.

Great for PDFs or Links to Free Memberships.

Powerful Features | Workflow Conversions Analytics

Analytics | Workflow Conversions

Analyze Conversion to Sale or Conversions

- Identify performance of workflows

- Very useful for:

    - Drip campaigns

    - Email signup campaigns

- Easily identify where your drip campaign "drops off"

- Tool for planning the next campaign (based upon where the last drop off was)
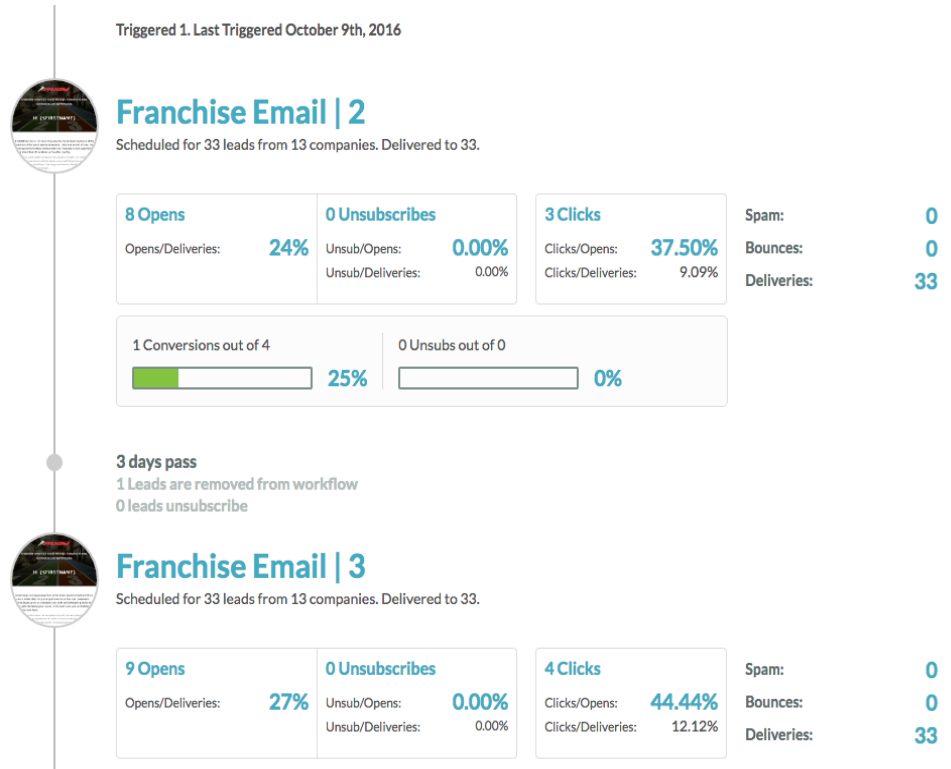
Powerful Features | API - set custom fields

Settings | API Reference

Trigger automation when custom fields are set

- Activate two types of workflows

  - Standard workflow

  - Date-based workflow

Perfect for selling date-driven products or courses

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Powerful Features | Tagging Emails

First, edit and create Tags for your emails (create groups of emails)

- Newsletter

- Advice

- Giveaways

Then, measure the results of your groups with report from Analytics | Email Reports

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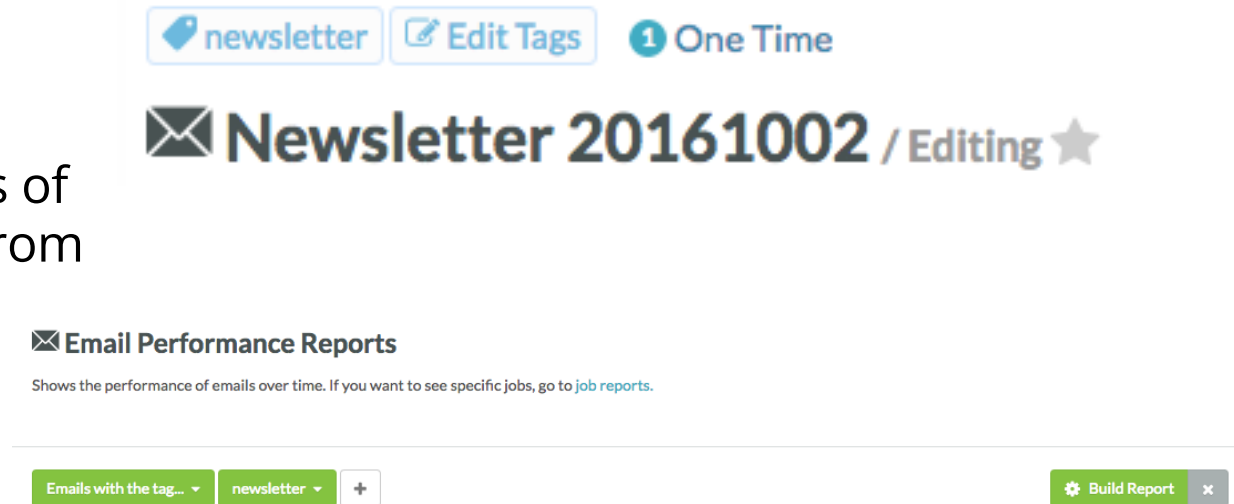
Email Deliverability

Get the right message to the proper person when they want it.

Sending an email is the easy part.

Getting the message into the inbox requires work.

Creating action from the email is the hard part.

Email Deliverability | Plain Text Settings

Create a plain text version of your HTML-based email

Make headers stand out

Crucial for SPAM filters

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Email Deliverability | mail-tester.com

Validate your emails
before sending

Take the time to do this!

Test the Spammyness of your Emails
FIRST, SEND YOUR EMAIL TO:
web-aHQS3L@mail-tester.com
THEN CHECK YOUR SCORE

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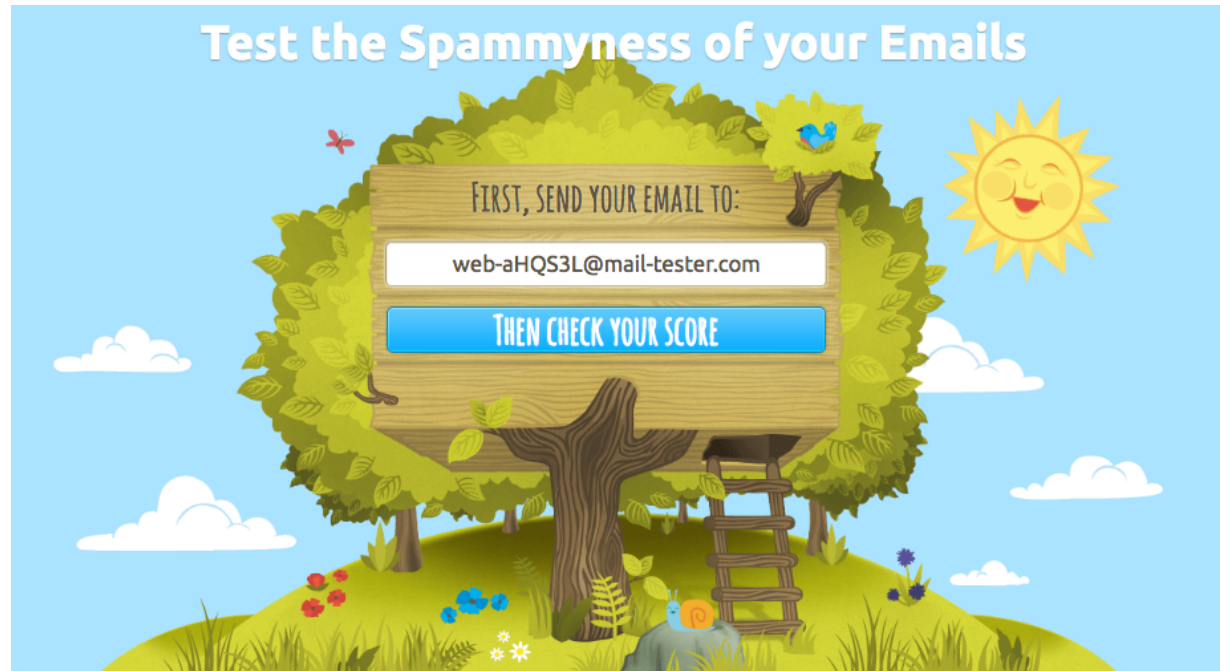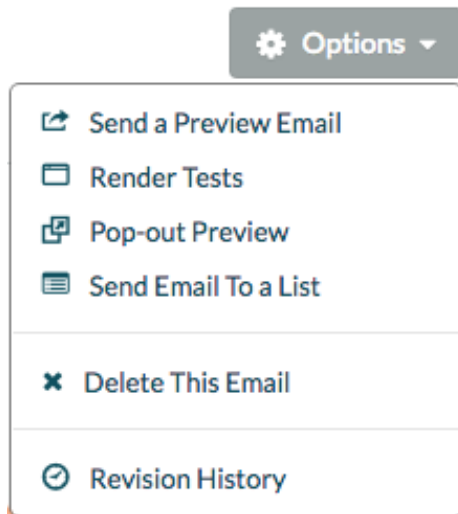
Email Deliverability | Configure SPF and DKIM

Setup and confirm your email address

Setup SPF – Don't get burned! Missing or misconfigured SPF records almost always mean SPAM

Setup DKIM - make sure you enter the CNAMES at the top-level DNS server

DMARC is very tricky

	You're properly authenticated	✓
	We check if the server you are sending from is authenticated	
✚	[SPF] Your server ▓▓▓▓ is authorized to use b7c61080-f48f-44b9-9f28-aa546e305643_7020544@mx-senderer-01.com	✓
✚	[Sender ID] Your server ▓▓ ▓▓ is authorized to use contact@▓▓▓.com	✓
✚	Your DKIM signature is valid	✓
✚	Your message passed the DMARC test	✓
✚	Your server ▓▓ ▓ ▓▓ is successfully associated with mailer3.gate169.rs.smtp.com	✓
✚	Your domain name **mx-senderer-01.com** is assigned to a mail server.	✓
✚	Your hostname **mailer3.gate169.rs.smtp.com** is assigned to a server.	✓

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Email Deliverability | Email: Render Tests

Be sure to use this feature
to ensure that your emails
look great on multiple
devices

✉ **Content Email: Pumpkin Pie Smoothie** / Render Tests
⊘ Thursday, November 3, 2016 10:33 AM

Outlook 2010

Outlook 2013

Gmail (Chrome)

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Email Deliverability | Customer "Segmentation"

Use Custom Fields for Segmentation

Create mailing lists based upon those segments.

Life just got easier! Use Dynamic Emails to send specific content to your segments

Filter: Available in Contact Manager ▾

📂 **Preferences**

✛ **Preferences:Interests**
☑ Checkbox • Lead Field • Editable in Contact Manager • Available in Forms

Preferences:Frequency
☑ Checkbox • Lead Field • Editable in Contact Manager • Available in Forms

Preferences:Unsubscribe
☑ Boolean • Lead Field • Editable in Contact Manager • Available in Forms

Preferences:HealthcareProfessional
☑ Boolean • Lead Field • Editable in Contact Manager • Available in Forms

Preferences:EmailSignup
☑ Checkbox • Lead Field • Editable in Contact Manager • Available in Forms

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Email Deliverability | Create A Clear Call to Action

Simplify your emails

Create a clear call to action

Use the Formats → Button feature in the Email Editor to create a button

Empower America's Youth through increased fitness, confidence and performance.

HELLO {$FIRSTNAME}

THANK YOU

Thank you for your interest in franchising with our company.

We've put together a Free Guide to Franchising. In the guide, you will find information on what a great industry this is to be in, what makes this business opportunity so unique and how by getting involved, you are making a difference in the lives of youth.

Get the Free Guide To Franchising

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Case Studies

Putting it into action.

Starting with Forms Management

Starting with Pipeline Management

Starting with Email Management

Click-Thru rates – 28% increase.

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Putting It Into Action

- Segment your email lists
   - Customer type, open frequency, interests

- Create simple emails with a clear call to action

- Test and validate the structure of your emails

- Performance testing
    - Send A/B tests to different groups
    - Send at different times

- Implement and monitor. Repeat. Repeat. Repeat.

- Follow up with workflow and additional communications

23%
conversion

Variation A

11%
conversion

Variation B

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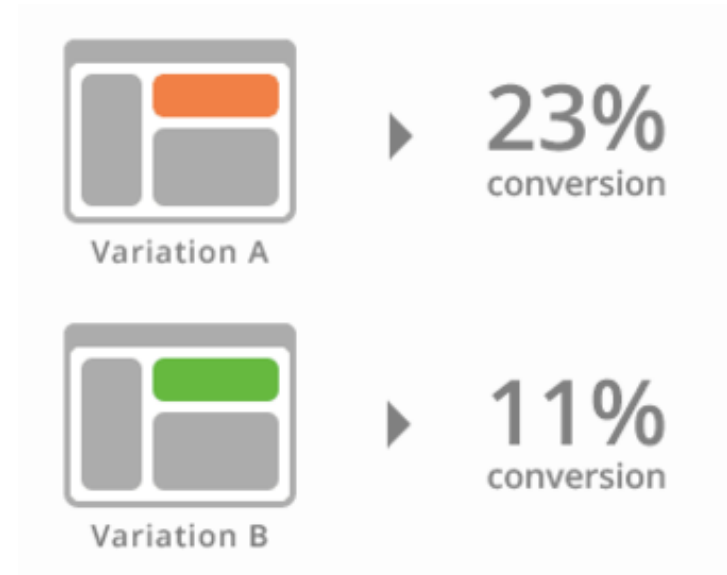
Customer Spotlight #1 | Forms Management

- B2B Client in the Technology Infrastructure Space

- Mobile responsive website

- Forms; quotes, support, channel partner program → sending notifications to sales team

- Visitor ID → drove interest in tracking leads

- Migration of emails from ESP to SharpSpring

- Sales Pipeline Tracking

- Email drip campaigns based upon customer and prospect segmentation

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Customer Spotlight #2 | Pipeline Management

- Youth Sports Industry Client
  - 90+ locations, franchise business

- Website redesign with focus on SEO

- Media Center for franchise sales materials

- Sales Pipeline Tracking with custom pipeline stages

- Email management with drip campaigns to nurture franchise leads

- Website-based Location Manager for franchisees; blogging → social media

- RSS Feed to franchisee contact list; use Jr. Salesperson role for list ownership

- Digital product sales, shopping cart abandonment

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Customer Spotlight #3 | Email Management

- Wellness Industry Client

  - 100,000+ contacts, millions of pageviews, very large affiliate program

- Email Newsletters, focusing on open rate and customer segmentation

- Media Center for both free and paid ebooks

- Date-based workflows and drip campaigns for Free 14-Day Challenge Program

- Website redesign to support paid memberships and programs

- Starting Dynamic Emails and Customer Segmentation

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Result: Click Thru Rates Improved 28%

Challenge 1	Challenge 2	Challenge 3

Get Deliverability Right

Make sure you follow the steps and best practices to get your emails into the inbox.

Improve Open Rates

- A/B Testing
- Using dynamic emails to send specific content to your email segments

Test Click Thru Rates

- Create a clear call to action
- Simplify your email message
- Use workflow automation to measure and plan

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Poll

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Questions?

Continuing the Conversation

With SharpSpring:

Questions?

Email sharpspring@sharpspring.com

Want to see more?

Request a demo on
www.sharpspring.com

With David:

David Schmeltzle
President
BizBudding Inc.
Email: david@bizbudding.com

Web: www.bizbudding.com

SharpSpring Partners:

Got a great success story?

Email ideas to nicole@sharpspring.com

With Bryan:

Bryan Tobin
Training and Usability Manager
SharpSpring
Email: bryan@sharpspring.com

Web: www.sharpspring.com

#SharpTweet live with us

SharpSpring

Thank You

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