



Drip Marketing Strategy & Analytics

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Agenda

- Drip Marketing Goals
- Using Populations for Deliver Campaigns
- Activity
- Analytics Tips and Tricks
- Pro Tips
- Q&A

#GOALS

*"If you want something new you have to
stop doing something old."*

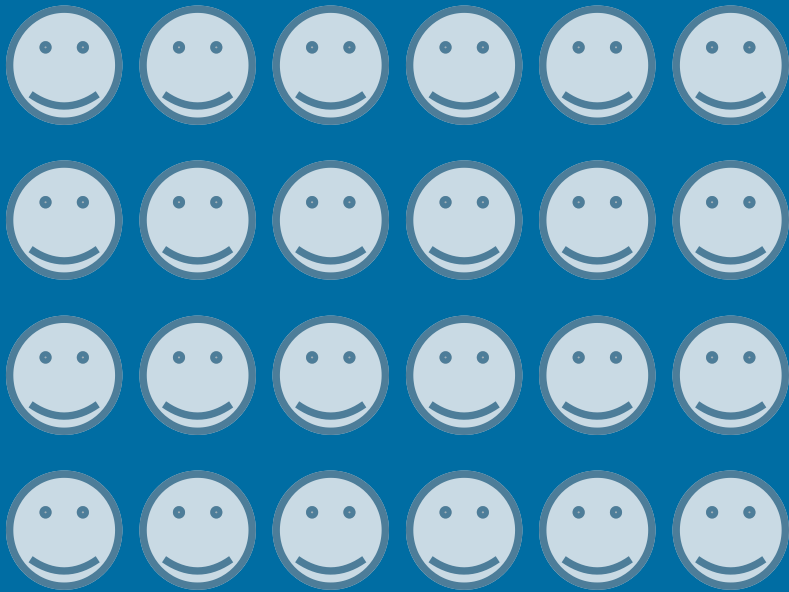
-Peter Drucker






Why “Drip Marketing?”

technolutions



DRIP MARKETING



| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
|--|---|---|---|---|---|---|---|---|---|
|  | | | | | | | | |  |
|  | |  | | | | | |  | |



English Majors



History Majors

Ask Yourself...

Who are we
targeting?

What do we want
them to do?

How do we
define them?

Populations



Person



Application

What do we want
them to do?



Visit Campus

Database

Populations

[Version History](#)

Search Populations...

| Name | | Status |
|-------------------------|--|----------------------|
| Insert | | |
| High Achieving Campaign | | Edit |
| Freshman Visit Campaign | | Edit |

Campaigns

| Name | Mailings | Running | Updated |
|-------------------------|----------|---------|---------|
| Freshman Visit Campaign | 0 | 0 | |
| High Achieving Campaign | 0 | 0 | |

- [Mailings](#)
- [Calendar](#)
- Campaigns**
- Populations**
- Overview**
- [Freshman Visit Campaign](#)
- [High Achieving Campaign](#)

How do we
define them?



Entry Term: 2021
Prospect Status: Inquiry
Event Registration Count <1



Rules Editor

The Rules Editor provides self-service management of rules. Warning: With great power comes great responsibility.

New Rule

| Name | Folder | Type | Status |
|---|--------------------|-------------------|---------|
| Decided - Released Decision | Applications | Person Population | Active |
| Decided - Confirmed Decision | Applications | Person Population | Active |
| Awaiting Submission | Applications | Person Population | Active |
| Awaiting Payment | Applications | Person Population | Active |
| Awaiting Materials - Custom Checklist Items | Applications | Person Population | Active |
| Awaiting Materials - Transcripts | Applications | Person Population | Active |
| Awaiting Materials - Recommendations | Applications | Person Population | Active |
| Awaiting Confirmation | Applications | Person Population | Active |
| Awaiting Decision | Applications | Person Population | Active |
| Skip Inactive Periods | Bins | Person Population | Active |
| Move to Awaiting Submission | Bins | Person Population | Active |
| Move to Awaiting Payment | Bins | Person Population | Active |
| Move to Awaiting Materials | Bin Movement | Bins | Active |
| Move to Read 1 | Bin Movement | Bins | Active |
| Person Status - Keep Applicant | Person Status | Person Status | Active |
| Person Status - Set Applicant | Person Status | Person Status | Active |
| Person Status - Keep Inquiry | Person Status | Person Status | Active |
| Person Status - Set Inquiry (Form Response) | Person Status | Person Status | Active |
| Person Status - Set Inquiry (Test Score) | Person Status | Person Status | Active |
| Person Status - Set Prospect | Person Status | Person Status | Active |
| Freshman Visit Campaign | Person Populations | Person Population | Preview |

Edit Details

Name: Freshman Visit Campaign

Population: Prospects

Type: Person Population

Folder: Person Populations /

Exclusivity Group:

Status: Preview

Save

Cancel

Triggers

All Rules

- [Person Update](#)
- [Person Update \(Overnight\)](#)
- [Application Update](#)
- [Application Submission](#)
- [Application Update \(Overnight\)](#)
- [Dataset Update](#)
- [Message Inbox \(Nightly\)](#)
- [Message Inbox \(Receipt\)](#)
- [Form Submission/Update](#)

Folders

All Folders

- [Application Status](#)
- [Bin Movement](#)
- [Person Populations](#)
- [Person Status](#)

Deferred Queues

- Application
 - first pass: 0
- Application (overnight)
 - first pass: 0
- Dataset
 - first pass: 0
- Message_Inbox
 - first pass: 0
- Organization Contacts
 - first pass: 0
- Organizations
 - first pass: 0

[All Rules](#)

Rules Editor

Edit

| | | |
|------------|-------------------------|-------------|
| Name | Freshman Visit Campaign | |
| Status | Preview | Copy Rule |
| Type | Person Population | Check Logic |
| Population | Prospects | Display SQL |
| Folder | Person Populations | New Query |

Filters

Estimated Rows0

Add Filter

FilterNOT(OR)

Entry TermIN Fall 2021

Prospect StatusIN Inquiry

Event Registration Count by Template, Status (Person-Scoped)Count < 1; Event Template IN Campus Tour, Information Session, Open House; Status IN Registered, A

Action

No Action Rule☐ Do nothing and skip processing of other lower-priority rules in this Exclusivity Group when filter criteria are met.

PopulationFreshman Visit Campaign

Save

Muppet, Gonzo

Inquiry 464489716

- Dashboard
- Timeline
- Profile
- Materials
- Details

Biographic

Born 01/02/2002, age 15

Contact

Email gonzo2345@technolutions.com

Tags

- Opt Out
- Test Record

Status History

06/10/2017 Inquiry

Populations

06/10/2017 Freshman Visit Campaign

[Set Default Tab](#)

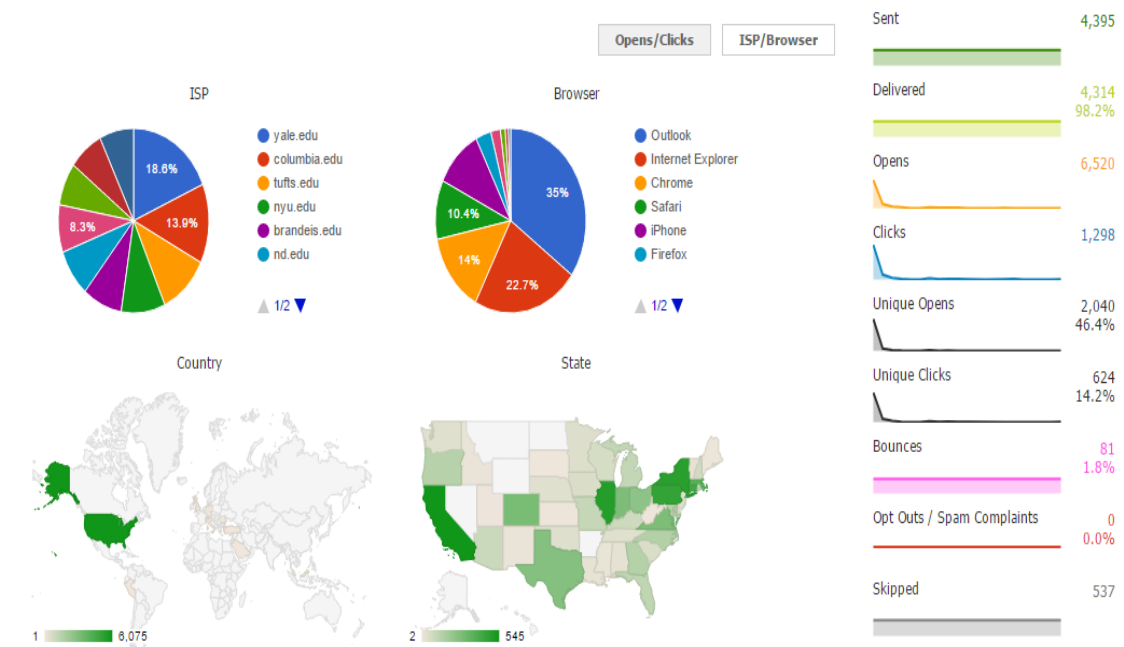
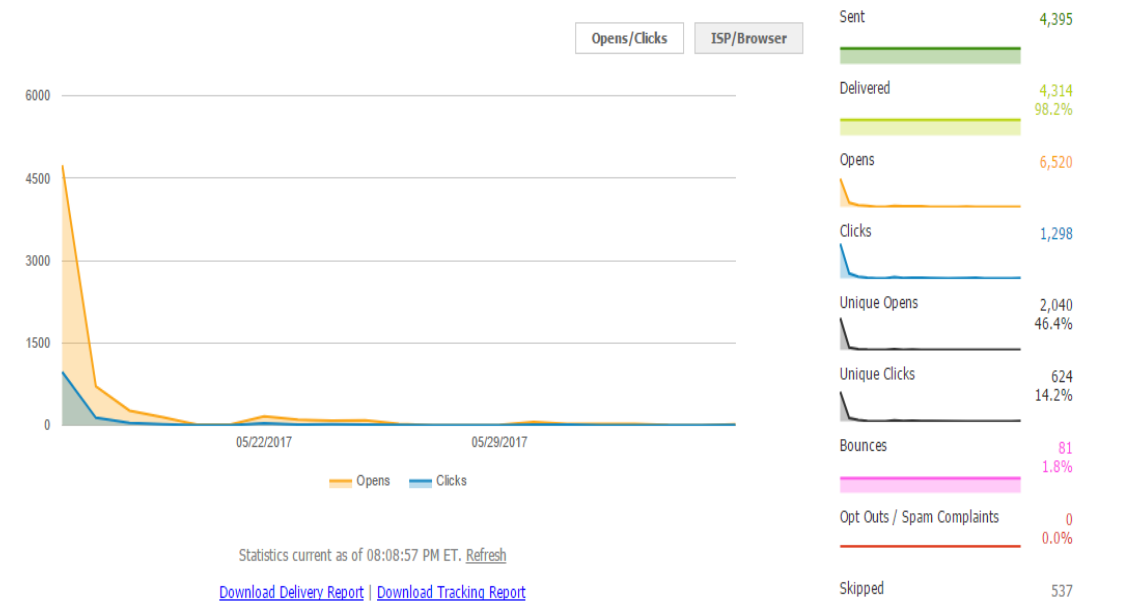
Mini-Activity

Create a Visit
Campaign Population

Set up 2-4
Campaign emails

Use Population filters
to define day intervals

Going Beyond The Deliver Report



Analytics

What data points
do you want?

Why use the
analytics tools?

How do you want
to use the data?

New Mailing

[Mailings](#)
[Calendar](#)
Campaigns

Populations

- Freshman Visit Campaign**
High Achieving Campaign

Mailings

Technolutions Slate (Slate Base Camp)

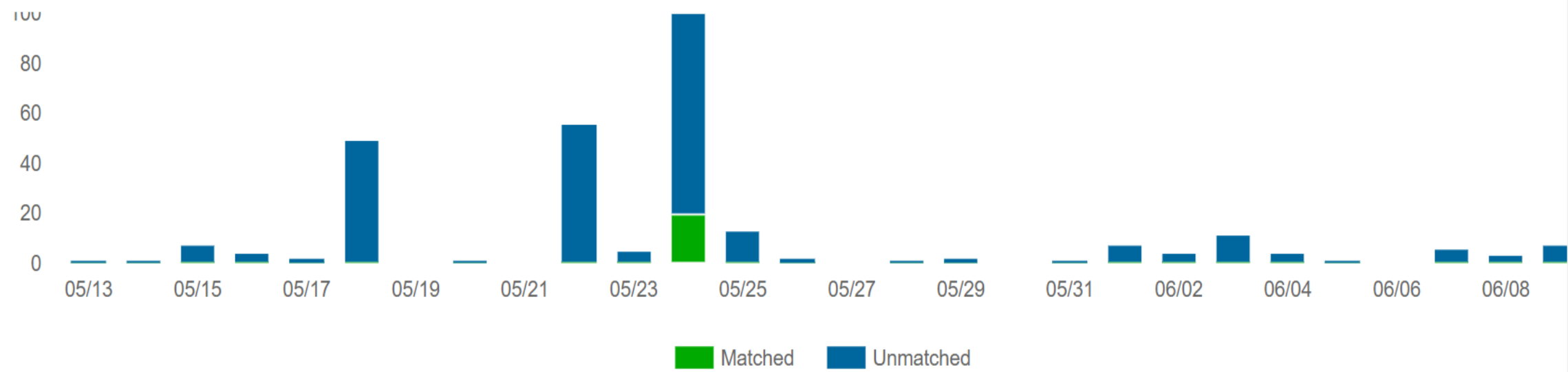
HERA3

www.slateuniversity.edu/page?utm_source=slate&utm_medium=email&utm_campaign=freshman&utm_term=visit

Ping

Ping enables you to track remote web access across institutional web properties outside of Slate and correlate those accesses with records in Slate. Ping data is aggregated periodically every hour, and Ping access is matched to Slate records every night. To enable Ping tracking on a website, add the following snippet of JavaScript to the HTML source of your webpage or template.

```
<script async="async" src="https://slate-demo.technolutions.net/ping">/**/</script>
```





(thanks!)

Goal:

Encourage students to
register for an event

Population:

Filters Check Logic Estimated Rows: 677

| | |
|--|---|
| Prospect Status | IN Inquiry |
| Entry Term | IN 2018 August (Fall Semester) |
| Event Registration Count by Template, Status (Person-Scoped) | Count < 1; Event Template IN Admitted Student Receptions, Admitted Student Residence Hall Tour Only Te... |





Slate Template Library

The Slate Template Library provides one-click access to the best resources built for Slate partner organizations.

In this library, you will find exports, filters, forms, triggers, portals, and other functional objects that can add immediately and directly to your Slate database. Just because you can easily add these objects to your database doesn't mean that you should. The more exports and filters that you have, the more likely your users will be confused and overwhelmed, and all of these same exports and filters are available throughout Slate even without adding them locally. The library is refreshed nightly, but you can also [refresh it on-demand](#) if you've recently added fields or other resources.

Query Bases (0 objects)

[Show/Hide](#)

Query Standard Exports (2 objects)

[Show/Hide](#)

| Name | Description | Category | Status |
|------------------------|--|-----------|---------------------|
| Ping Statistics | Configurable export for Ping counts and durations based on optional timestamps | Prospects | Add |
| Ping Statistics by URL | | Prospects | Add |

Query Test Score Exports (0 objects)

[Show/Hide](#)

Query Custom Exports (0 objects)

[Show/Hide](#)

Query Standard Filters (5 objects)

[Show/Hide](#)

| Name | Category | Status |
|------------------------------|-----------|---------------------|
| Ping by URL | Prospects | Add |
| Ping Count by Timestamp | Prospects | Add |
| Ping Count by URL, Timestamp | Prospects | Add |
| Ping Duration by Timestamp | Prospects | Add |
| Ping Duration by URL | Prospects | Add |

Filters Check Logic **Estimated Rows: 677**

Prospect Status IN Inquiry

Entry Term IN 2018 August (Fall Semester)

Event Registration Count by Template, Status (Person-Scoped) Count < 1; Event Template IN Admitted Student Receptions, Admitted Student Residence Hall Tour Only Te...



Filters Check Logic **Estimated Rows: 34**

Prospect Status IN Inquiry, Prospect

Entry Term IN 2018 August (Fall Semester)

Event Registration Count by Template, Status (Person-Scoped) Count < 1; Event Template IN Admitted Student Receptions, Admitted Student Residence Hall Tour Only Te...

(

Ping Duration by URL Duration (seconds) > 30; URL LIKE http://www.marquette.edu/explore/apply-today.php

OR

Ping Duration by URL Duration (seconds) > 30; URL LIKE https://admissions.marquette.edu/apply/

)

New Mailing

Name

Folder /

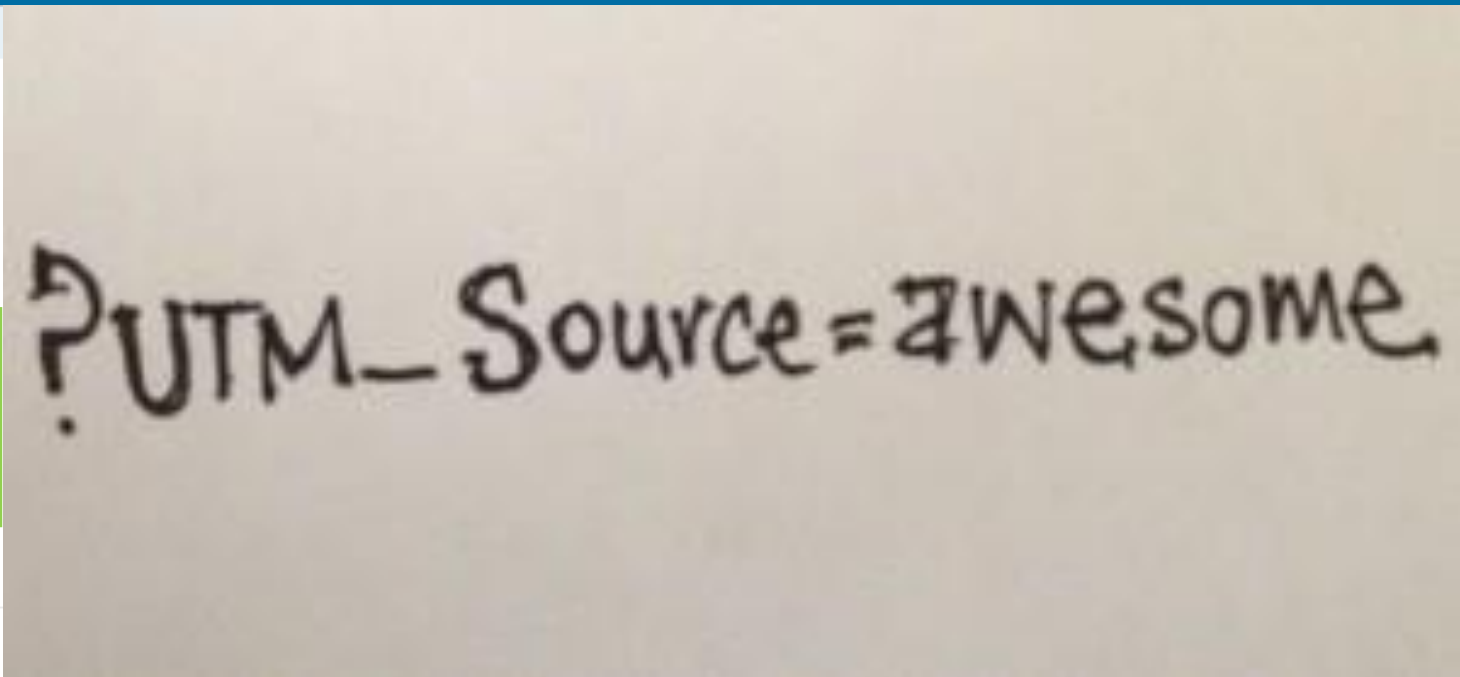
User

Method

Opt Out

UTM Tracking

| | | | |
|----------|---|---------|------------------------------------|
| Source | <input type="text" value="slate"/> | Medium | <input type="text" value="email"/> |
| Term | <input type="text" value="open-house"/> | Content | <input type="text" value=""/> |
| Campaign | <input type="text" value="ping"/> | | |



Exports

Email

First

Middle

Last

Form UTM Source

Form UTM Medium

Form UTM Term

Form UTM Content

Form UTM Campaign

| First ▼ | Middle ▼ | Last ▼ | Form UTM Source ▼ | Form UTM Medium ▼ | Form UTM Term ▼ | Form UTM Content ▼ | Form UTM Campaign ▼ |
|-----------|-----------|------------|-------------------|-------------------|-----------------|--------------------|---------------------|
| Charlotte | Asike | Agrawal | | | | | |
| Xavion | Reed | Anderson | | | | | |
| Sim | Faye | Avery | slate | email | open-house | | ping |
| Karina | Yasmin | Beauchamp | slate | email | open-house | | ping |
| John | Eddie | Bell-Moran | | | | | |
| Ryan | A | Daniel | facebook | ad | open-house | | june |
| Rutvi | Rwei-Feng | Longe | facebook | ad | open-house | | june |
| Alex | M | Williams | | | | | |
| Dean | A | Williams | slate | email | open-house | | ping |
| Dougie | J | Williams | | | | | |

Tying Analytics to Your Campaign

Go back to your
campaign(s)

Add Ping filters to
a mailing

Add UTM parameters
to a mailing

Pro Tips

Define your goals and
your strategy first

Draft your communication
plan outside of Slate

Activate population rules
AFTER emails are built

Collaborate with your
Marketing Department



Lastly...

**DON'T
BE
BASIC**

Try something new!

The logo for the Slate Innovation Summit Base Camp. The word "slate" is in a large, bold, blue sans-serif font. Below it, "INNOVATION SUMMIT" is in a smaller, blue, all-caps sans-serif font. At the bottom, "BASE CAMP" is in a green, all-caps sans-serif font, with the letters spaced out.

slate

INNOVATION SUMMIT
BASE CAMP

Questions?



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