Welcome!

HAPPY NEWS

What’s a recent campaign win you’re proud of?

Client Roundtable - August 28, 2025

Let's get Personal!

{{content.Agenda Header}}

1. Welcome {{content.Event Audience}}
2. {{content.Dave Dad Joke}}
3. {{content.Topic 1}}
4. {{content.Topic 2}}
5. Group Discussion

Personalization vs. Personas

- **Personalization:** use what a contact told you
- **Personas:** assumptions based on categories

Ways to think of "Personalization"

- **Traditional:** first name, dates, personal data
- **Immediate:** response right after engagement
- **Long-term:** follow-up campaigns, bubble-up lists

ASK THE AUDIENCE

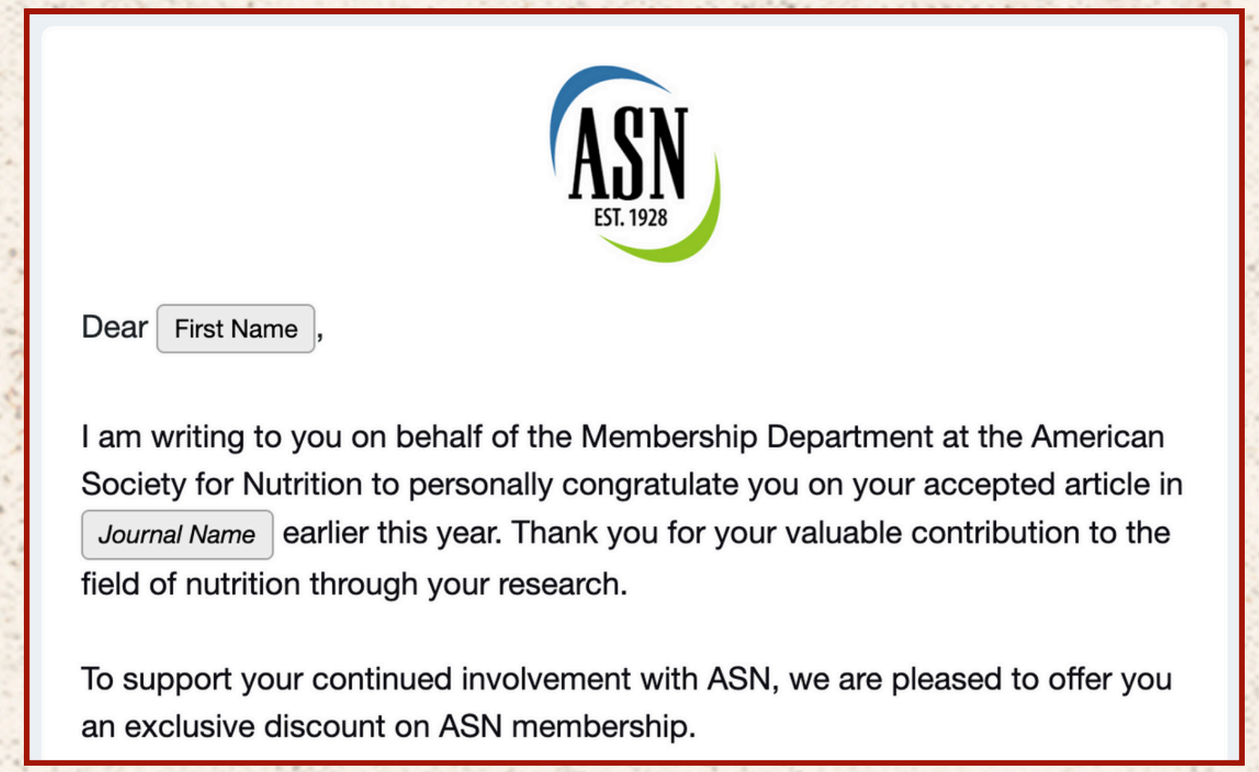
How are you currently using Personas or Personalization?

American Society for Nutrition

Traditional example - Member Acquisition

Personal data - Journal Name

- Contacts had their article published in 1 of 4 ASN Journals
- Non-members
- Acquisition with exclusive discount



ASN
EST. 1928

Dear First Name ,

I am writing to you on behalf of the Membership Department at the American Society for Nutrition to personally congratulate you on your accepted article in *Journal Name* earlier this year. Thank you for your valuable contribution to the field of nutrition through your research.

To support your continued involvement with ASN, we are pleased to offer you an exclusive discount on ASN membership.

Missouri State Teachers Association

Traditional example - Advocacy

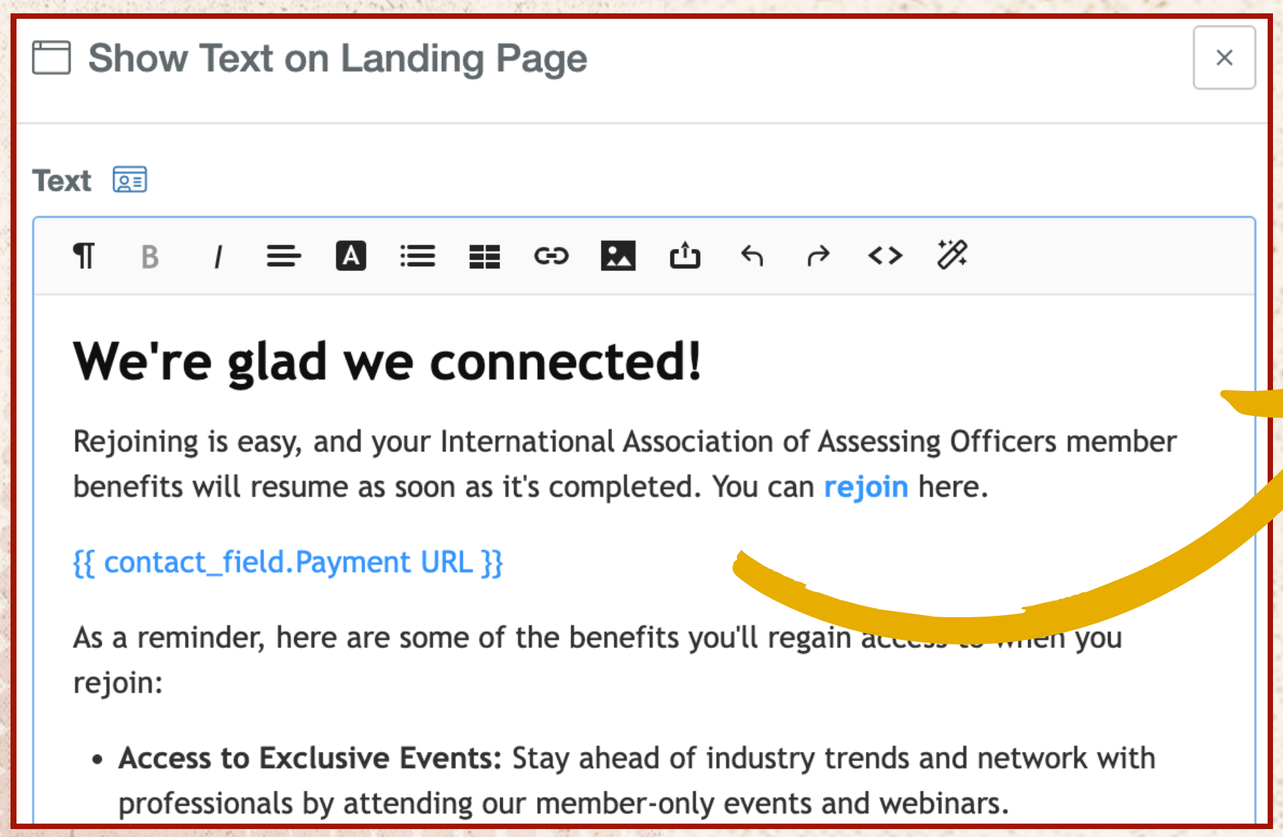
Personal data - location

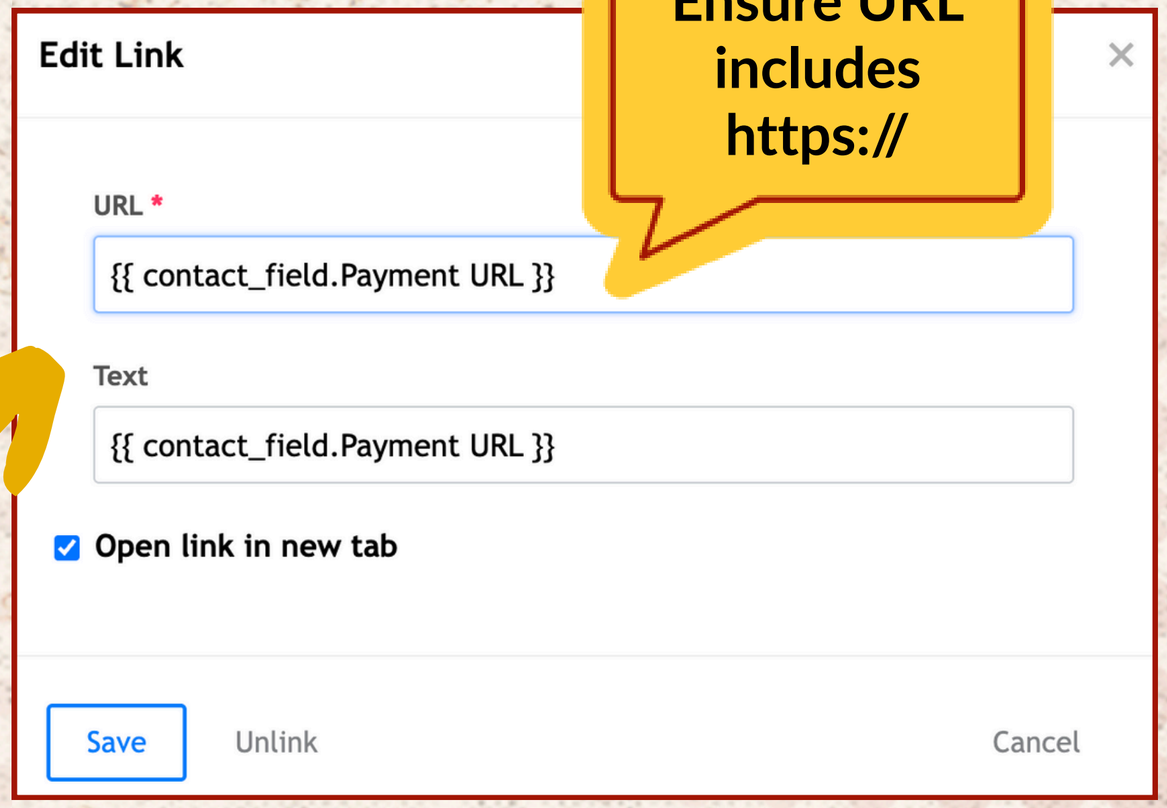
- Segmented members by location
- Better serve needs of local communities through advocacy efforts

International Association of Assessing Officers

Traditional example - Lapsed Win-back

- Uploaded contacts via CSV including a unique payment URL
- Utilized Personalization Token as hyperlink



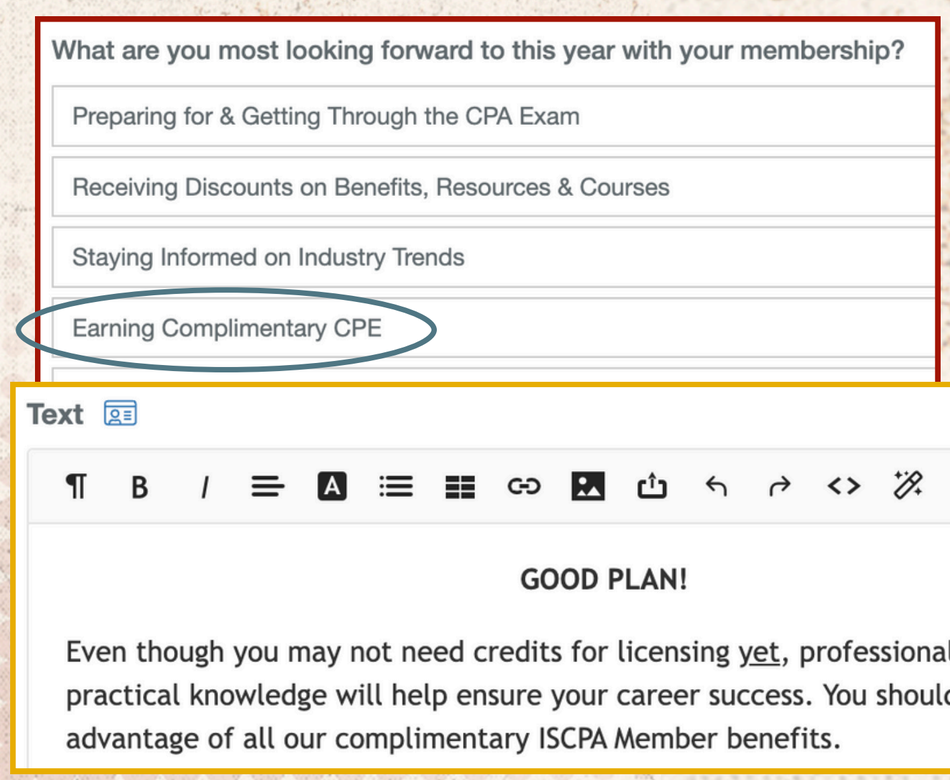


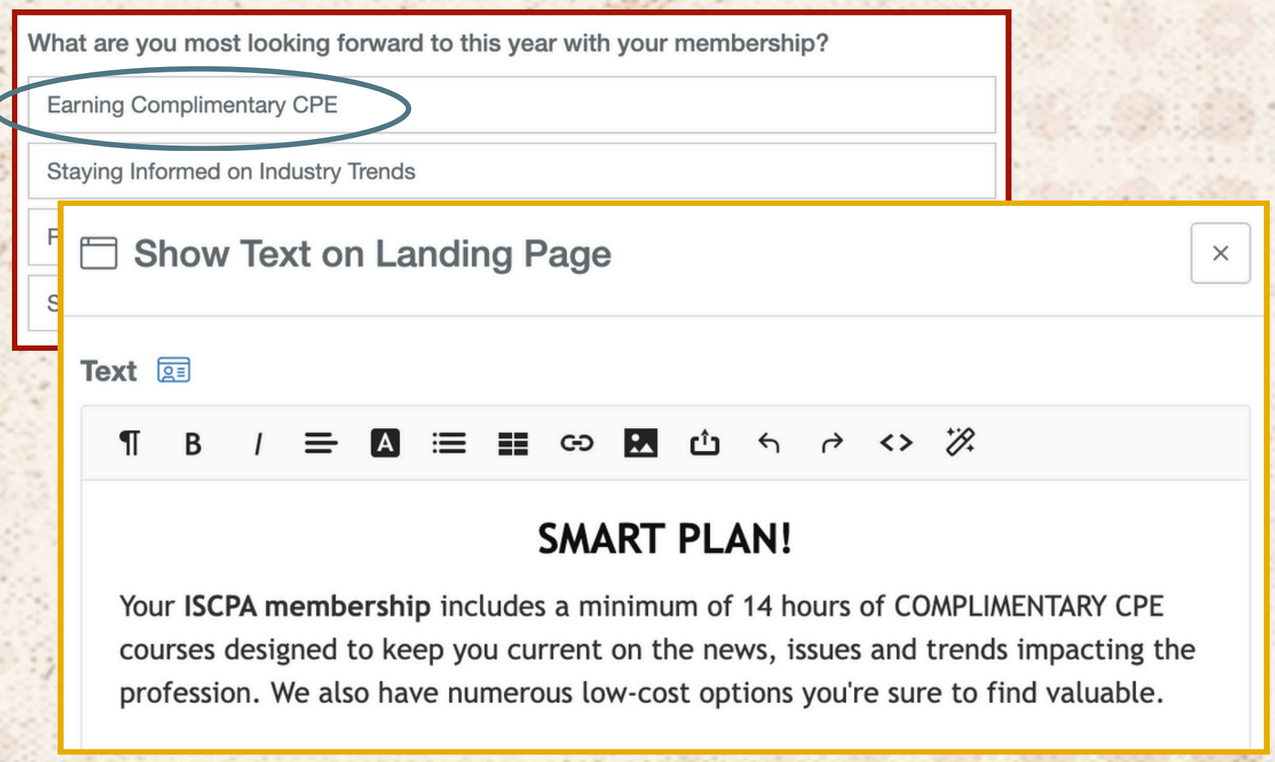
Ensure URL includes https://

Idaho Society of CPAs

Immediate example - New Member Onboarding(s)

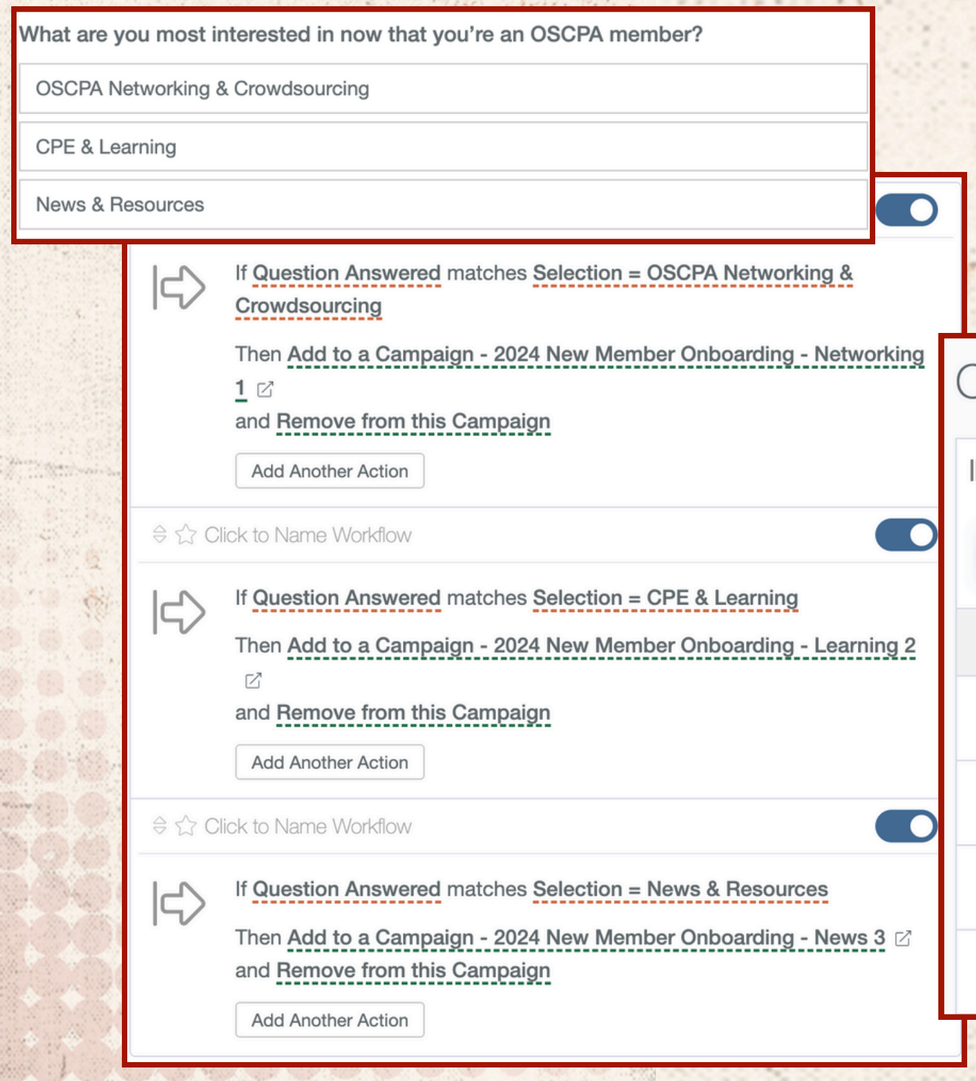
- Members entered in segmented campaign after joining
- Member type specific responses and landing page copy



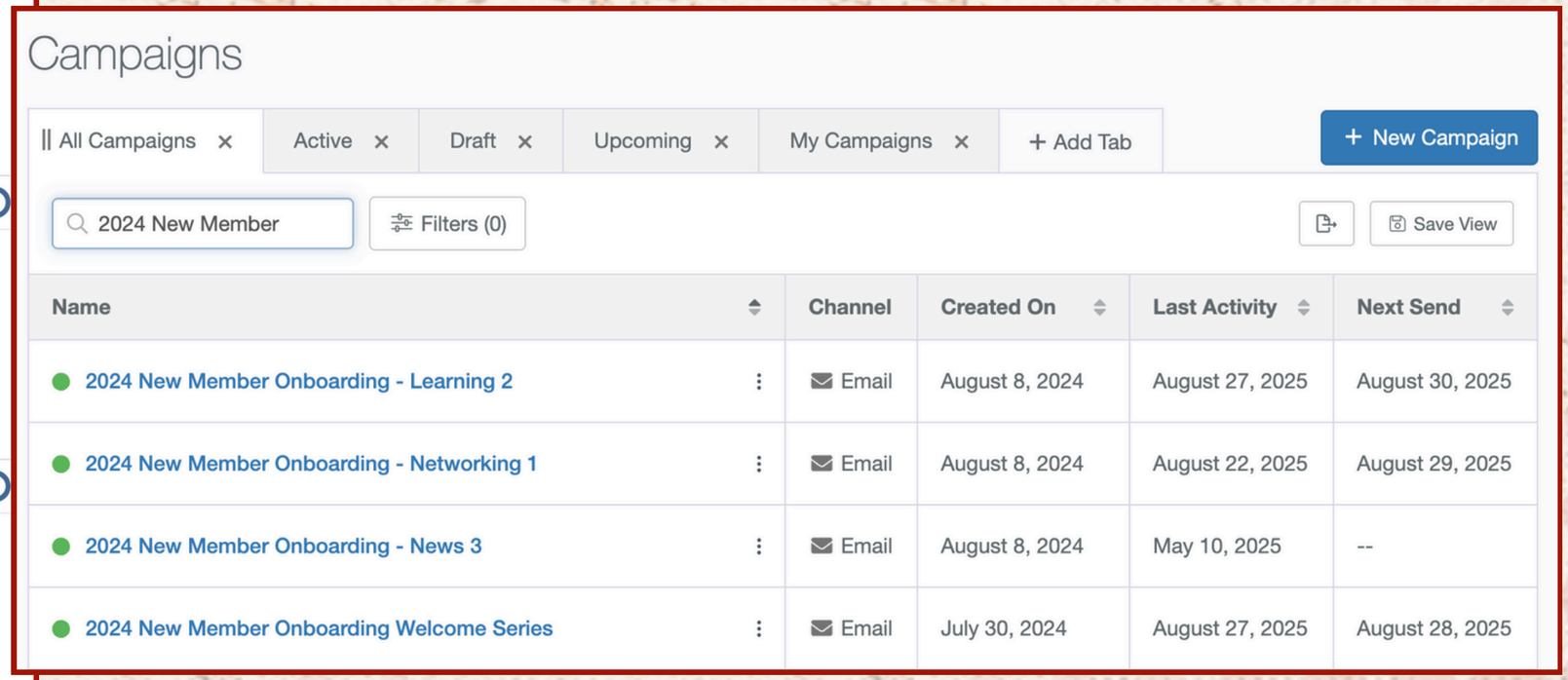


The Ohio Society of CPAs

Immediate example - New Member Onboarding



- Branching to unique onboarding campaigns based on initial response



Name	Channel	Created On	Last Activity	Next Send
2024 New Member Onboarding - Learning 2	Email	August 8, 2024	August 27, 2025	August 30, 2025
2024 New Member Onboarding - Networking 1	Email	August 8, 2024	August 22, 2025	August 29, 2025
2024 New Member Onboarding - News 3	Email	August 8, 2024	May 10, 2025	--
2024 New Member Onboarding Welcome Series	Email	July 30, 2024	August 27, 2025	August 28, 2025

American College of Health Care Administrators

ACHCA
American College of Health Care Administrators

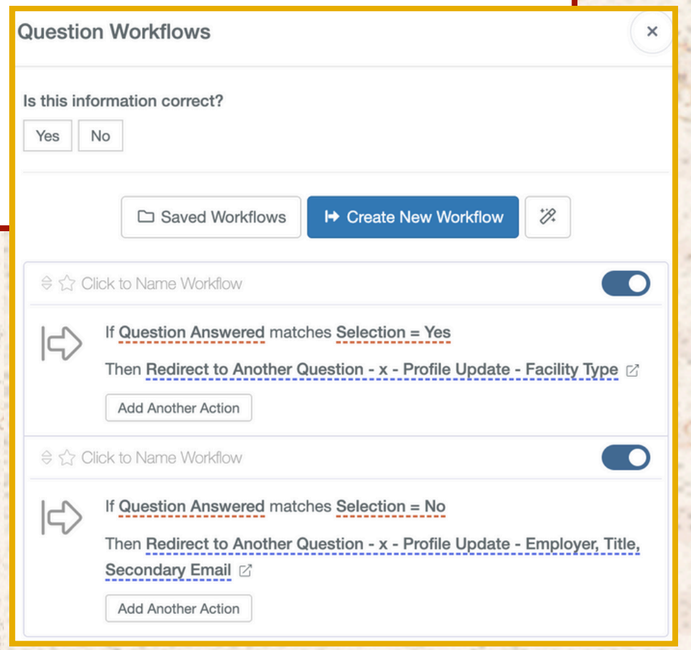
Hi First Name ,

We haven't heard from you!

We're doing a quick audit of our records and want to make sure what we have on file for you is correct. Here is what we have:

Title: Title
Employer: Organization
Secondary Email: Secondary Email

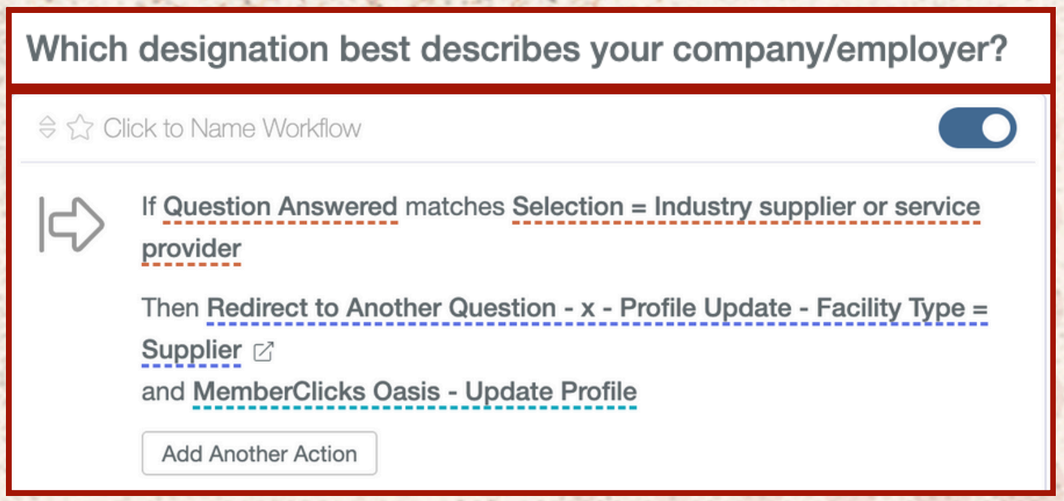
64% Engagement Rate



Immediate - Profile Update

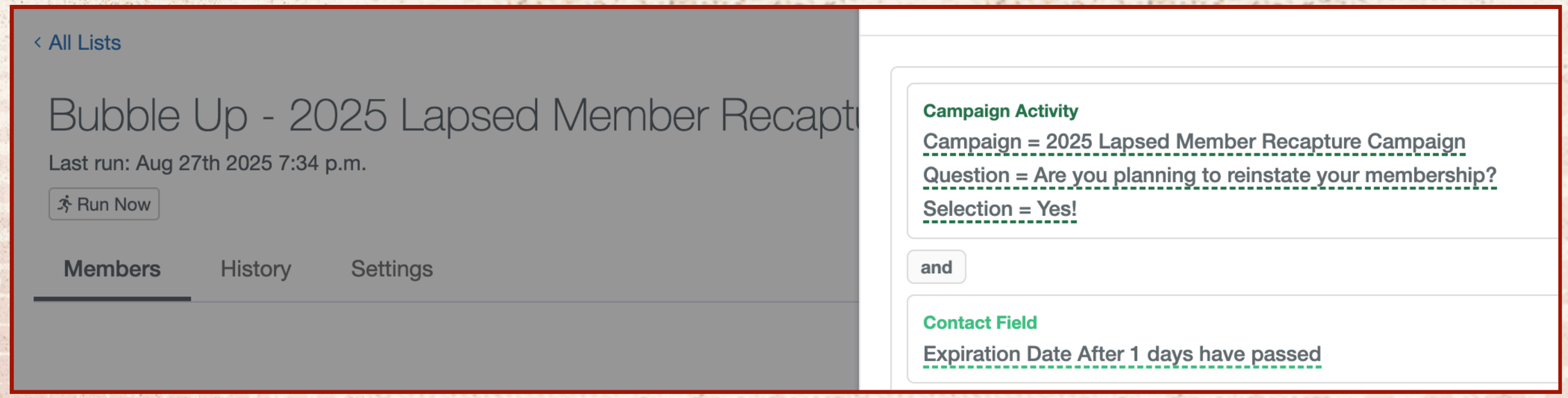
- Personalization token showing current information
- Profile Write-Backs

Long-term - Future Campaigns



Bubble them up!

- Long-term personalization
- Build list of contacts who provided positive intent but haven’t taken action
- List filters
  - Campaign Activity: Campaign, Question, Selection (YES!)
  - “Action-related” field: Expiration date, registration status, etc.

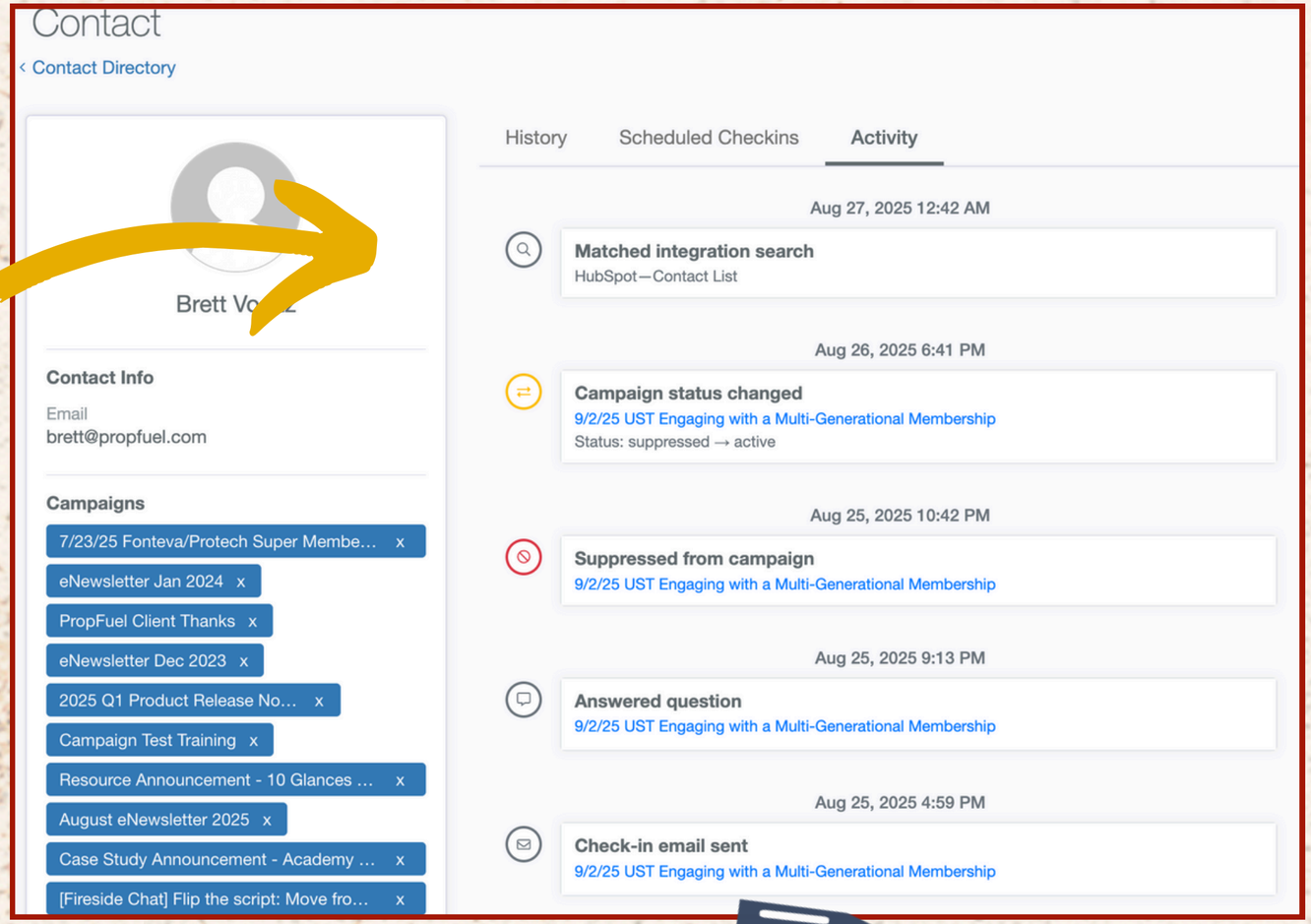


Group Discussion

- Where in your current member journey do you see the biggest opportunity for personalization?
- What member signals or data points do you wish you had that would help you personalize more effectively?
- Thinking ahead to the next 6–12 months, what's one way you'd like to evolve your use of personalization in campaigns?

Product updates!

- Advanced field mapping
- Global search box
- Contact activity timeline
- Website Engagement:
  - Saved themes
  - Mobile check-ins
  - Open text field validations - email & phone



Coming soon… **Blackout dates for emails!**