

Welcome!



HAPPY NEWS

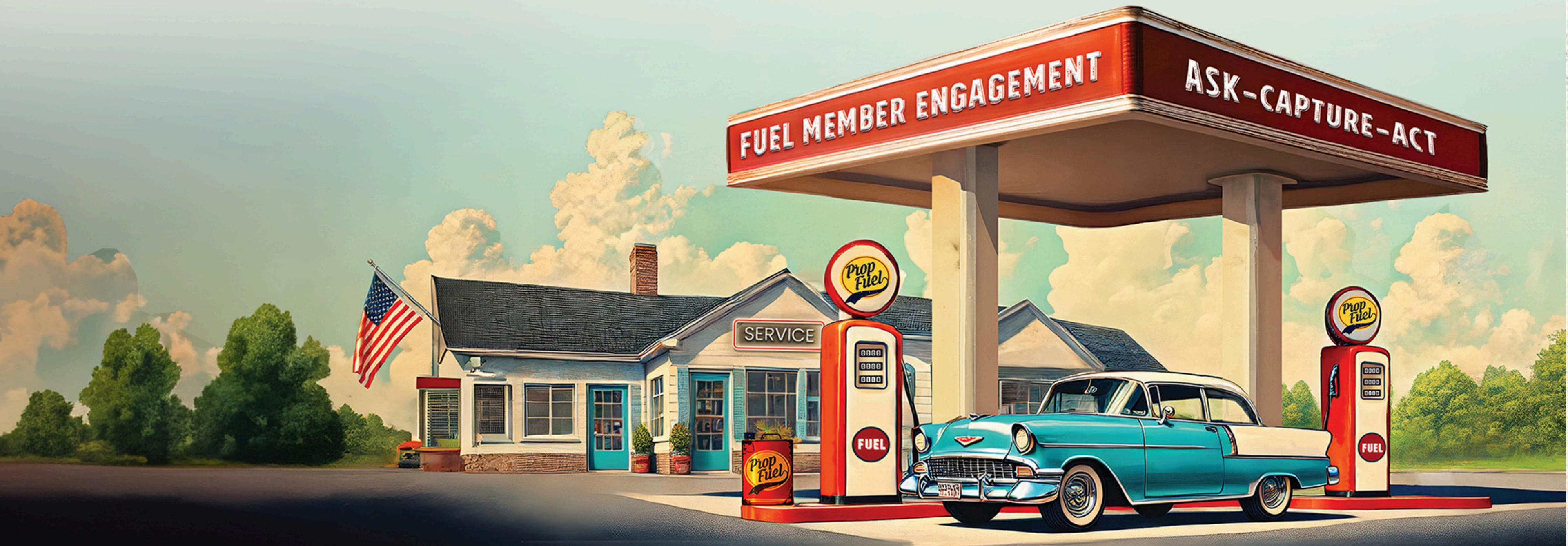
**What's a recent campaign
win you're proud of?**



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

A series of red and black dashed lines of varying lengths, arranged in a semi-circular arc on the left side of the slide.

ASK THE AUDIENCE

**How are you currently using
Personas or Personalization?**

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



Dear ,

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 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



**MISSOURI STATE
TEACHERS ASSOCIATION**

Dear ,

We know classroom discipline has been challenging within the Springfield School District. Please be assured that MSTa is actively addressing this concern on your behalf. We have seen the best results when advocating for individual members when they encounter issues, but we also want to make sure your voice is heard at the district level. Can you answer three short questions to help us share your concerns in an accurate way?

☆ Click to Name Workflow



If Contact Search - Nimble AMS matches Institution__c = Springfield R-XII and NU__MemberThru__c = 2024-6-30

Then Add to this Campaign

Traditional example - Lapsed Win-back

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

Show Text on Landing Page

Text

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We're glad we connected!

Rejoining is easy, and your International Association of Assessing Officers member benefits will resume as soon as it's completed. You can [rejoin](#) here.

[{{ contact_field.Payment URL }}](#)

As a reminder, here are some of the benefits you'll regain access to when you rejoin:

- **Access to Exclusive Events:** Stay ahead of industry trends and network with professionals by attending our member-only events and webinars.

Edit Link

URL *

{{ contact_field.Payment URL }}

Text

{{ contact_field.Payment URL }}

☒ Open link in new tab

Save

Unlink

Cancel

Ensure URL includes https://

Immediate example - New Member Onboarding(s)

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

What are you most looking forward to this year with your membership?

Preparing for & Getting Through the CPA Exam

Receiving Discounts on Benefits, Resources & Courses


Staying Informed on Industry Trends

Earning Complimentary CPE

What are you most looking forward to this year with your membership?


Earning Complimentary CPE


Staying Informed on Industry Trends

Text 

GOOD PLAN!

Even though you may not need credits for licensing yet, professional education and practical knowledge will help ensure your career success. You should take advantage of all our complimentary ISCPA Member benefits.

Show Text on Landing Page 

Text 

SMART PLAN!

Your ISCPA membership includes a minimum of 14 hours of COMPLIMENTARY CPE courses designed to keep you current on the news, issues and trends impacting the profession. We also have numerous low-cost options you're sure to find valuable.



Immediate example - New Member Onboarding

- Branching to unique onboarding campaigns based on initial response

What are you most interested in now that you're an OSCPA member?

OSCPA Networking & Crowdsourcing

CPE & Learning

News & Resources

If Question Answered matches Selection = OSCPA Networking & Crowdsourcing

Then Add to a Campaign - 2024 New Member Onboarding - Networking 1 and Remove from this Campaign

Add Another Action

Click to Name Workflow

If Question Answered matches Selection = CPE & Learning

Then Add to a Campaign - 2024 New Member Onboarding - Learning 2 and Remove from this Campaign

Add Another Action

Click to Name Workflow

If Question Answered matches Selection = News & Resources

Then Add to a Campaign - 2024 New Member Onboarding - News 3 and Remove from this Campaign

Add Another Action

Campaigns					
All Campaigns x Active x Draft x Upcoming x My Campaigns x + Add Tab + New Campaign					
Q 2024 New Member Filters (0) Save View					
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



Hi ,

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:

Employer:

Secondary Email:

Immediate - Profile Update

- Personalization token showing current information
- Profile Write-Backs

Long-term - Future Campaigns

64%
Engagement
Rate

Question Workflows

Is this information correct?

☒

Then [Redirect to Another Question - x - Profile Update - Facility Type](#)

☒

Then [Redirect to Another Question - x - Profile Update - Employer, Title, Secondary Email](#)

Which designation best describes your company/employer?

☒

Then [Redirect to Another Question - x - Profile Update - Facility Type = Supplier](#) and [MemberClicks Oasis - Update Profile](#)

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.

The screenshot displays the Prop Fuel interface for configuring a list filter. On the left, a sidebar shows the breadcrumb "< All Lists" and the title "Bubble Up - 2025 Lapsed Member Recapture". Below the title, it indicates "Last run: Aug 27th 2025 7:34 p.m." and includes a "Run Now" button with a play icon. At the bottom of the sidebar are tabs for "Members", "History", and "Settings", with "Members" currently selected. The main content area on the right shows the filter configuration. It starts with a green header "Campaign Activity", followed by three lines of criteria: "Campaign = 2025 Lapsed Member Recapture Campaign", "Question = Are you planning to reinstate your membership?", and "Selection = Yes!". These criteria are underlined in green. Below this is a white box with the word "and". Underneath is another green header "Contact Field", followed by the criterion "Expiration Date After 1 days have passed", which is also underlined in green.

Group Discussion

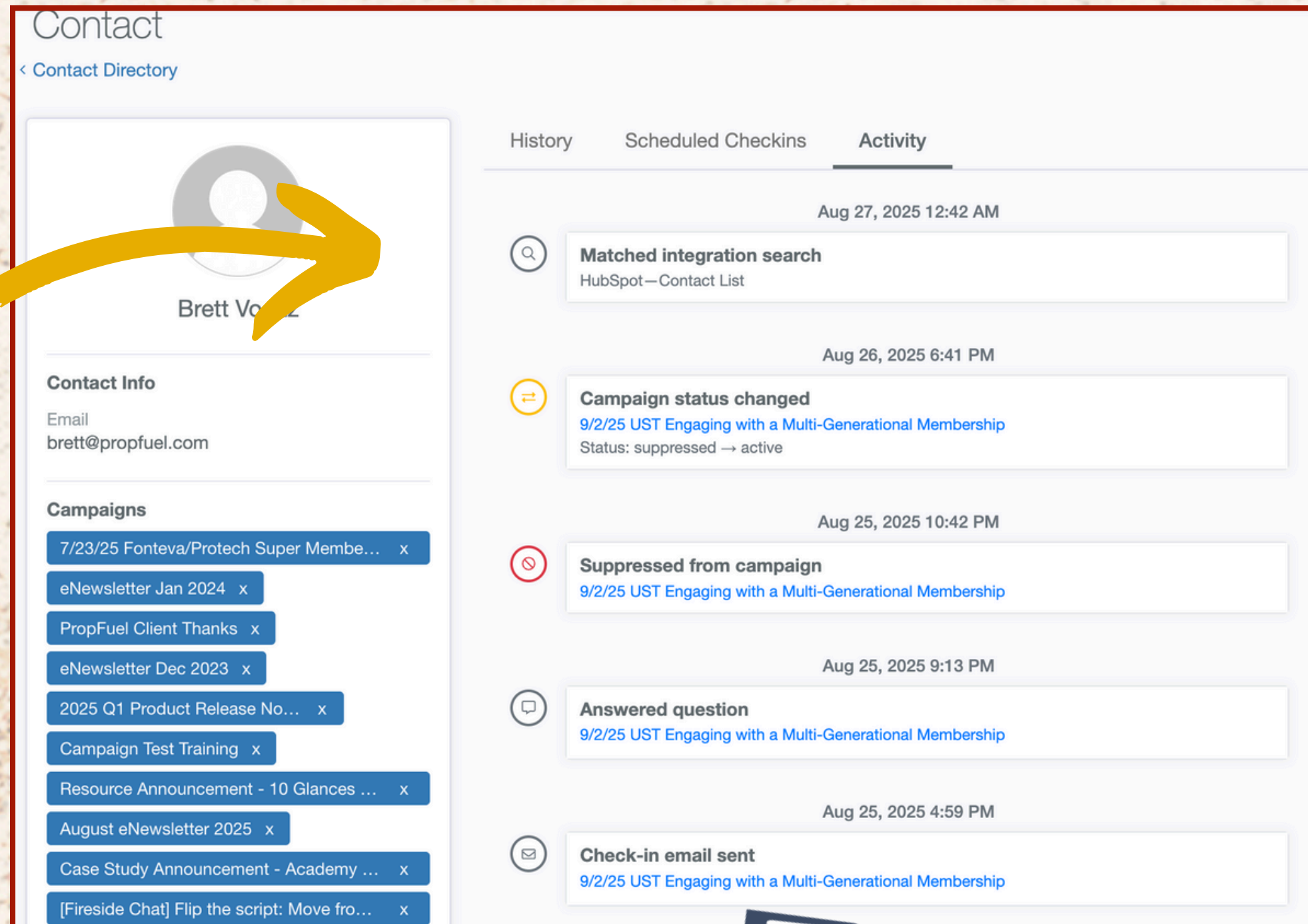


- Where in your current member journey do you see the biggest opportunity for personalization?
- What member signals or data points do you wish you had that would help you personalize more effectively?
- Thinking ahead to the next 6–12 months, what's one way you'd like to evolve your use of personalization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

