



Strategy + Coaching  
Marketing Automation

Fostering meaningful digital engagement doesn't happen overnight. As a leader in online communities and email engagement strategies, the Higher Logic Strategic Services team understands how to **leverage technology, data, and strategy** to **personalize audience experiences**. With our Strategy and Coaching Strategic Services package, our marketing automation experts will help you **build a foundation of best practices and accelerate the learning curve** for **faster, better results**.

#### HIGHER LOGIC STRATEGIC SERVICES WILL HELP YOU:

##### **Expedite the learning curve**

Leverage the expertise of a dedicated team to lay a foundation of best practices. Get the answers to questions you didn't know to ask!

##### **Nail the strategy**

The Higher Logic team lives and breathes engagement strategy – tap into that expertise from a team of engagement experts.

##### **Strive for excellence**

Good marketing execution is revisited, revised, and continually updated to improve results. We'll work together to test, tweak, and tighten your initiatives and campaigns to maximize results.

##### **Understand the outcome**

Our team will walk with you through the maze of metrics, KPIs, and analytics, so you fully understand your results. Together, we'll identify actionable, meaningful data that impacts your organizational goals and objectives.

##### **Expand your knowledge**

Along the way, your team will better understand how to use the platform, create and implement goal-driven strategies, and make data-based decisions that maximize your investment, support your goals, and build your internal capabilities.

## A Strategic Approach to Marketing Automation

### Discovery Meeting

Together, we'll define engagement goals, objectives, and KPIs.

### "Day in the Life" Persona Development

Choose two\* key audience segments to develop or refine. We'll document persona attributes, insights, and nuances, as well as define persona lifecycles as applicable.

### Campaign Goals + Schedule

Plan two\* lifecycle or promotional campaigns for your 12-month service timeline. We'll provide strategic guidance for development, including key messaging and tone, content and calls to action, email cadence, and remarketing opportunities.

### Template Review, Design + Support

Review existing email designs, then create or optimize new templates to support campaigns. We'll consult with you regarding campaign audience groups (inclusion, exclusion, conversion) and help build out email messages using your input on text, images, hyperlinks, and target groups.

### Build Automated Campaigns

This includes mapping out the campaign process flow, defining appropriate date and time-wait steps, setting up brand logic to customize your communication flow, and assigning mailings and target groups.

## Monthly Coaching + Consultation

### Campaign Performance + Reporting

We'll help your team monitor campaign results and review performance metrics. We'll also provide ongoing recommendations based on campaign performance.

### Continued Campaign Engagement

Launching your marketing campaigns is just the beginning – let's work together to leverage current campaign data insights for ideas on continued engagement.

### Education + Training

We'll share marketing expertise, best practices, and relevant case studies, as well as identify training needs for you and your team.

### Reporting on Impact Metrics + Milestones

Put those data insights to work – we'll review all year-end performance metrics and milestones to see what worked and what's next.

*\*The Strategy + Coaching package requires a minimum 12-month contract.*