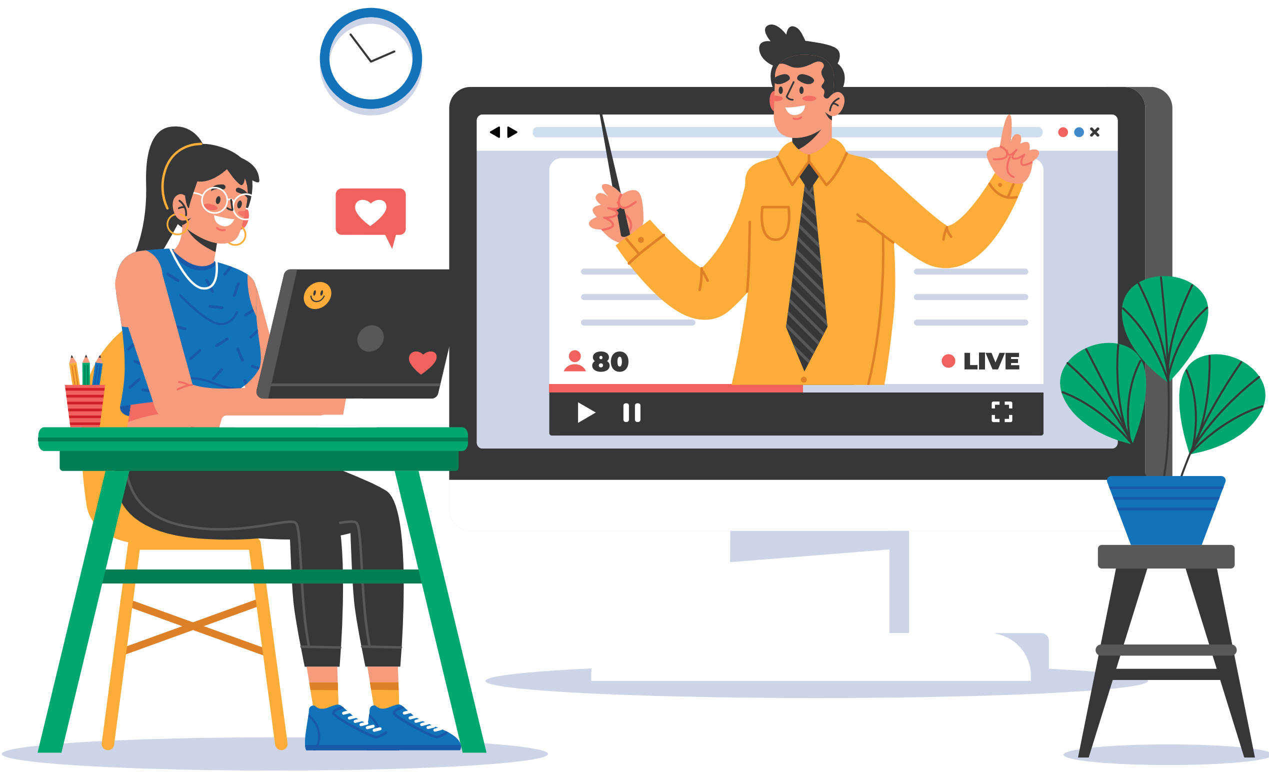
HighRoad Solutions™

Adestra Advanced Training

Handbook



In the Advanced Adestra training you will embark on how to setup and use Conditional Content, setup and sending of an Email Automation program and advanced reporting using Export Manager. You'll walk away with understanding of more complex areas in which you can leverage the platform for greater efficiencies and success.

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Section 1. Conditional Content

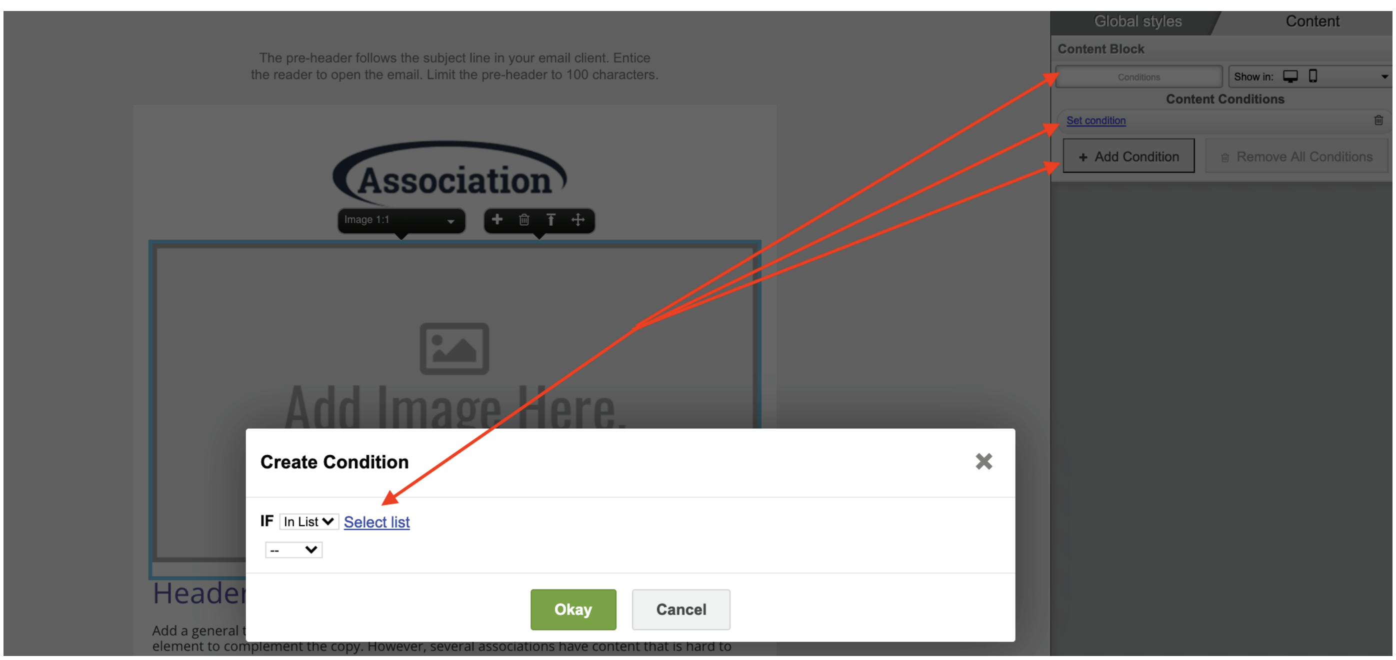
Conditional Content

Conditional content (also known as Dynamic Content), allows you to alter the email content of your campaigns based on a condition that affects or uses the information you have stored about your contacts. This allows you to tailor your campaigns for each member - as certain parts can be displayed or hidden based on the conditions matched - providing the opportunity for greater engagement and higher conversions. Conditional content eliminates the need for you to create more than one campaign.

Exercise Add conditional contents

1. Click 'Conditions' in your content module
   a. Click add condition
   b. Click on set condition
   c. Choose your list for 'if' (If you need to add more than one list, choose 'if' or 'and' within the drop down; select your list.)
2. Click save
3. Add additional conditions

*Repeat the above steps



IF - IF allows you to create basic conditions; if the condition is true, then the subsequent content will be included in that recipient's copy of the campaign. If the condition is false, then it won't be included. A marketer can set the condition so that as long as the field contains a value then the content is displayed for that contact.

ELSE - ELSE indicates an alternative to the IF condition.
i.e., If the member has a value in the 'first_name' field the information to update details would be displayed. If there were no value in the field, the alternative text would be displayed.

AND/OR - Marketers can apply more complicated logic by extending the template tag to include multiple fields, on an AND or OR basis. Including AND means that all conditions need to be true, whereas including OR means only one condition must be true.

Section 2: Email Automation

What is automation?

At its core, Marketing Automation is the goal of Adestra that automates your marketing practices—simplifying working processes by using automation to do otherwise time-consuming work.

It does more than just that however, as it also provides an opportunity for a better journey for your members.

This allows you to send timely and relevant content, reduce your workload, save time and increase ROI.

Email Automation Components

Segments
Identify your target audience based on their demographics, interests, behaviors, etc.

Content
Build and map your content themes to meet your key objectives and values.

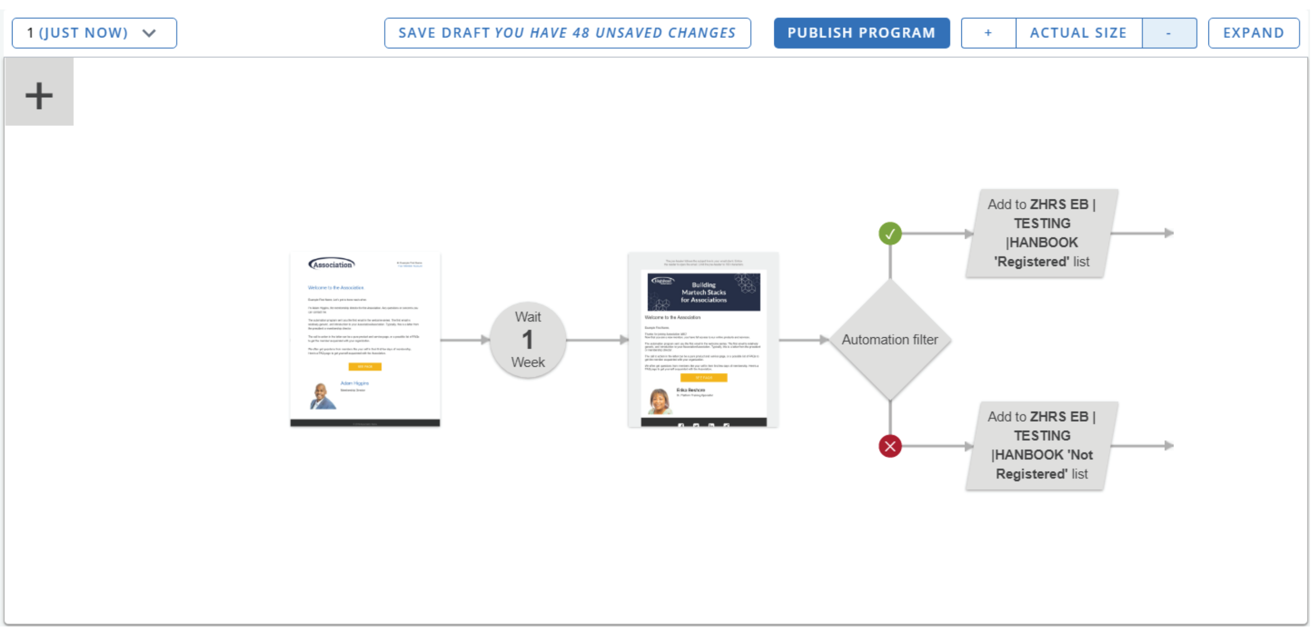
Assets
Identify the formats of your assets and where they're going to fall in the workflow.

Workflows
Bring all the pieces together into the platform and hit go.

Exercise: How to create an Automation Program

1. Build a campaign for automation. (Same process as creating a campaign with only a few additional steps.)
2. Assign a list to your campaign: you can choose a test list.
3. Test your campaign(s)
4. Click Test and launch campaign
5. Click Publish campaign
    a. On the 4th stage page of test and launch
    b. Tab over to publish only
    c. On the publish page click publish campaign
6. Navigate to automation [located under campaigns on left-hand nav]
7. Click 'create new program' on the right-hand side
    a. Program settings
        i. Give program a name
        ii. Owner (will default as the signed in user)
        iii. Choose your process
            - Contacts pass through this program only once; or
            - Contacts may be added again after contact has completed
        iv. Select core table
        v. Click save

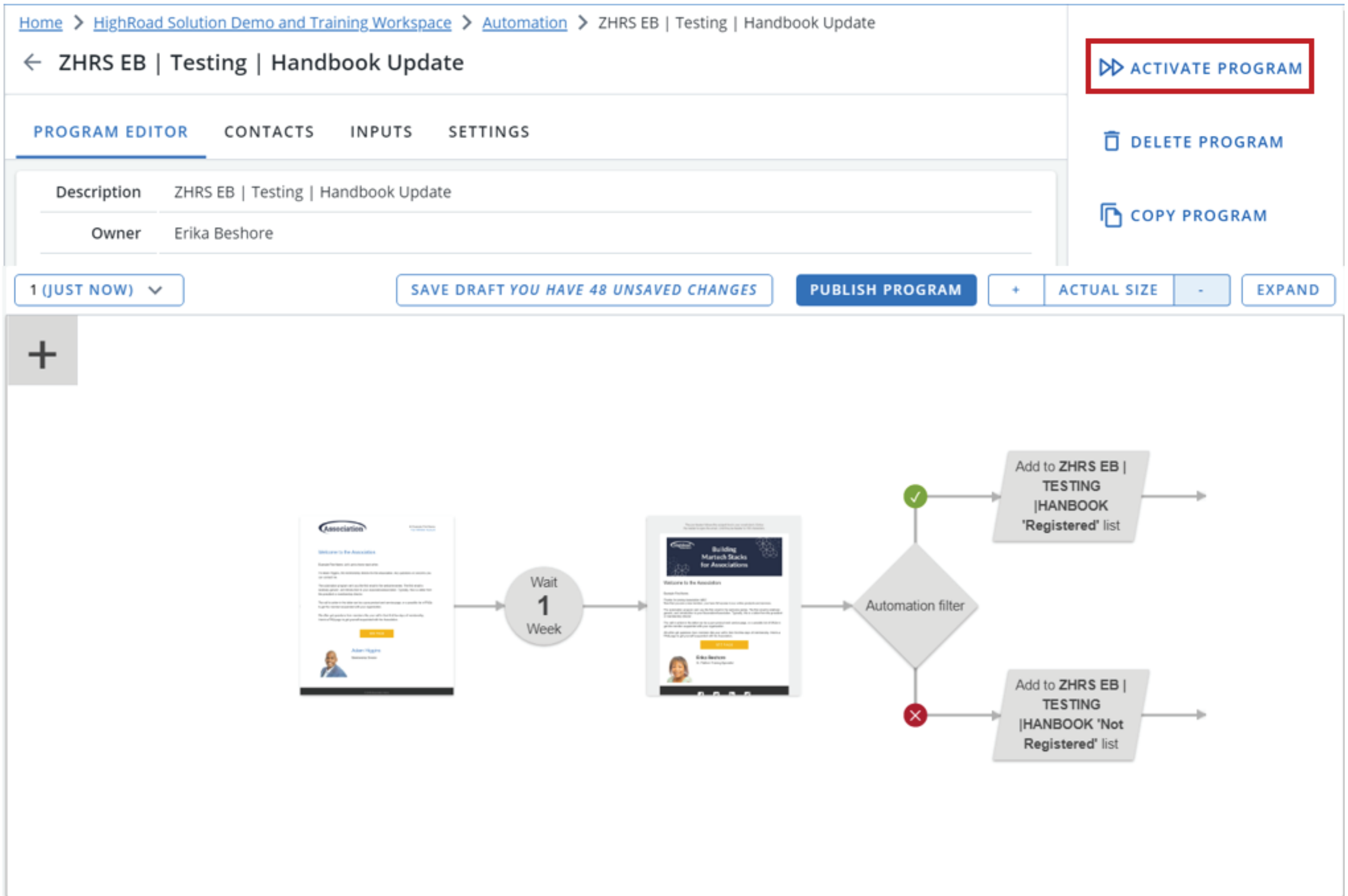
Start staging your campaign(s) and branches
Save your draft along the way



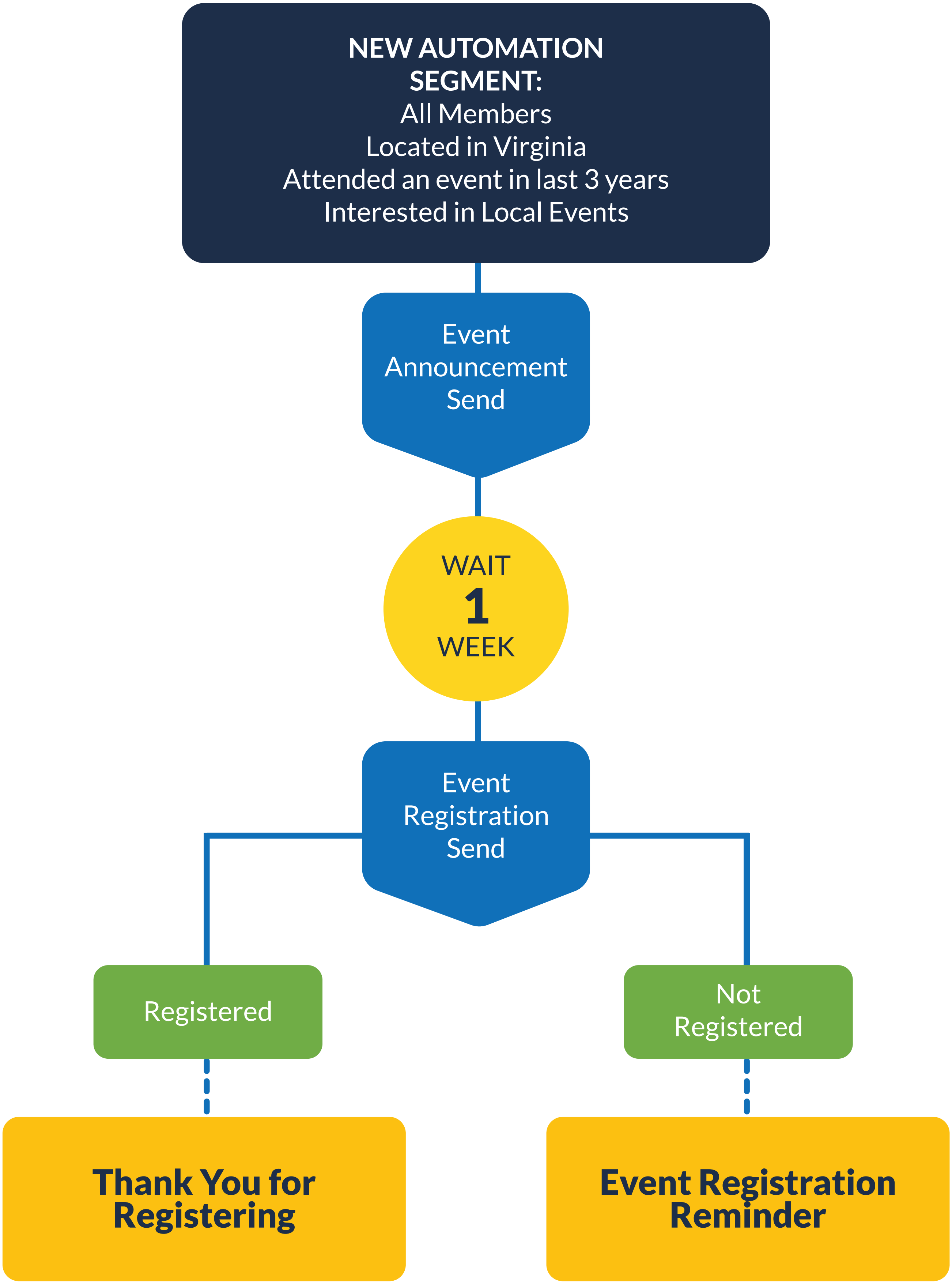
8. Once you place your campaigns and branches in your automation, publish your program

9. Go to your input data dynamic list and associate the list to your program

10. Final step is to go back to your automation sequence and click 'ACTIVATE' located in the top right of the page.



Event Registration Automation Example



Section 3. Export Manager

Using the Export Manager allows for access to events data, generated by activity from your campaigns. Each export contains three main parts; fields, events (not required for device & location exports) and data source, which you will need to configure for each export you create.

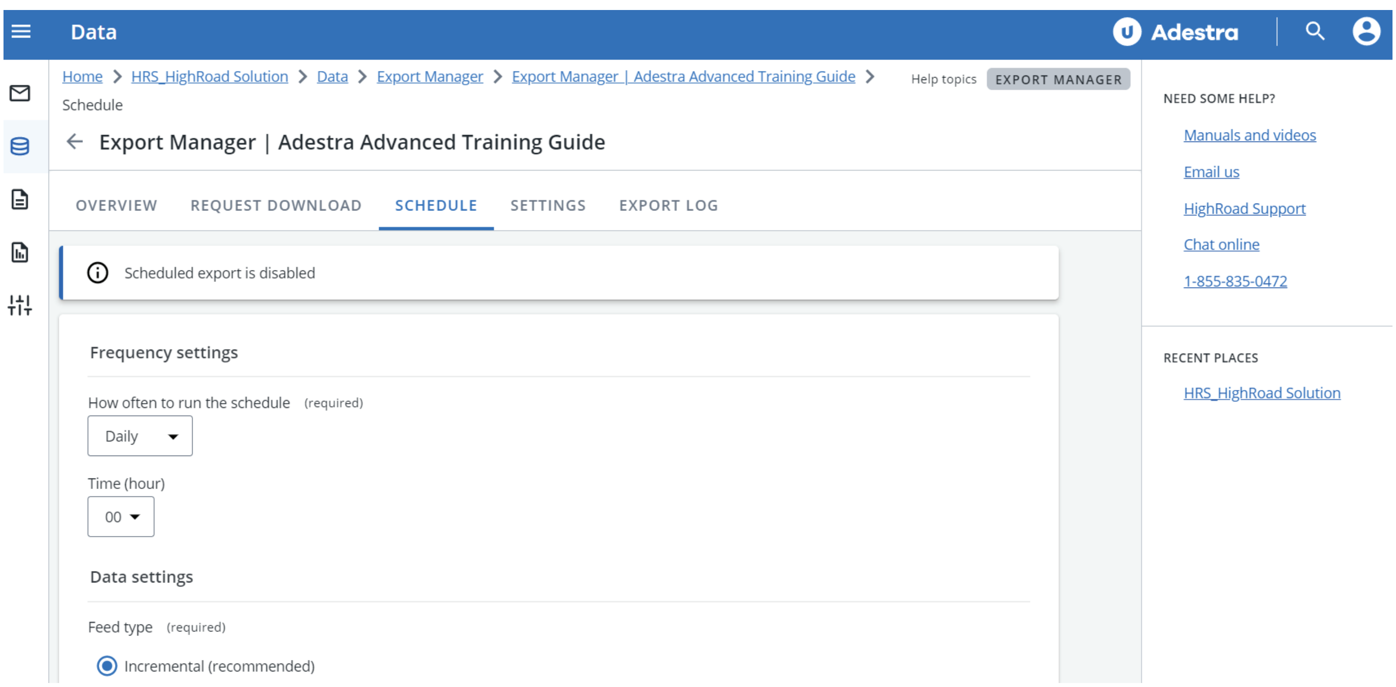
The data fields that appear in your final output file are selected from your core table and data tables, and you can tailor the fields you want to include for each export.

Choosing a data source means that you can restrict where the events data in your export comes from. You can have multiple data sources which can be, for example, as broad as whole workspaces, or as specific as individual launches, depending on what you want your final output file to contain.

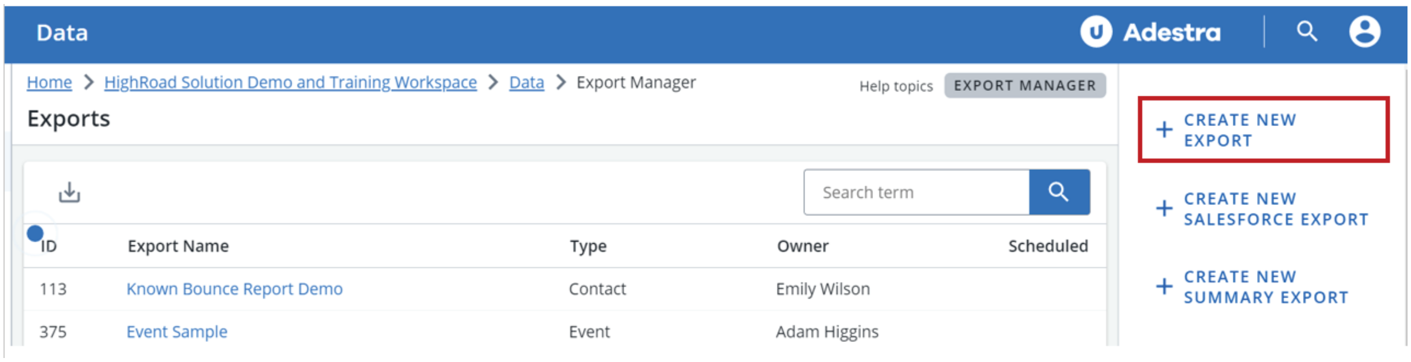
Exercise

Create new Export

1. To report at an aggregate level, head over to the Data section of your workspace and click into the “Export Manager”.



2. Here you will "Create a new report," found by clicking the link in the top right area of the page.



3. Provide your export with a name

Optional: provide a short description

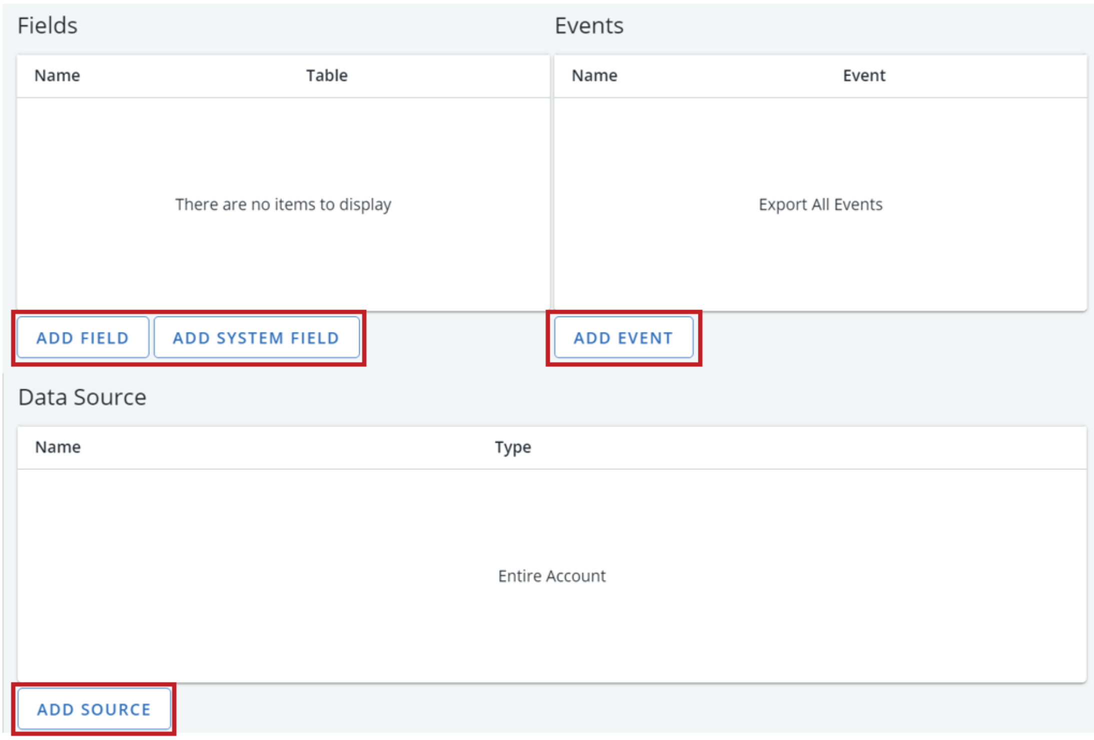
4. Choose your type of export

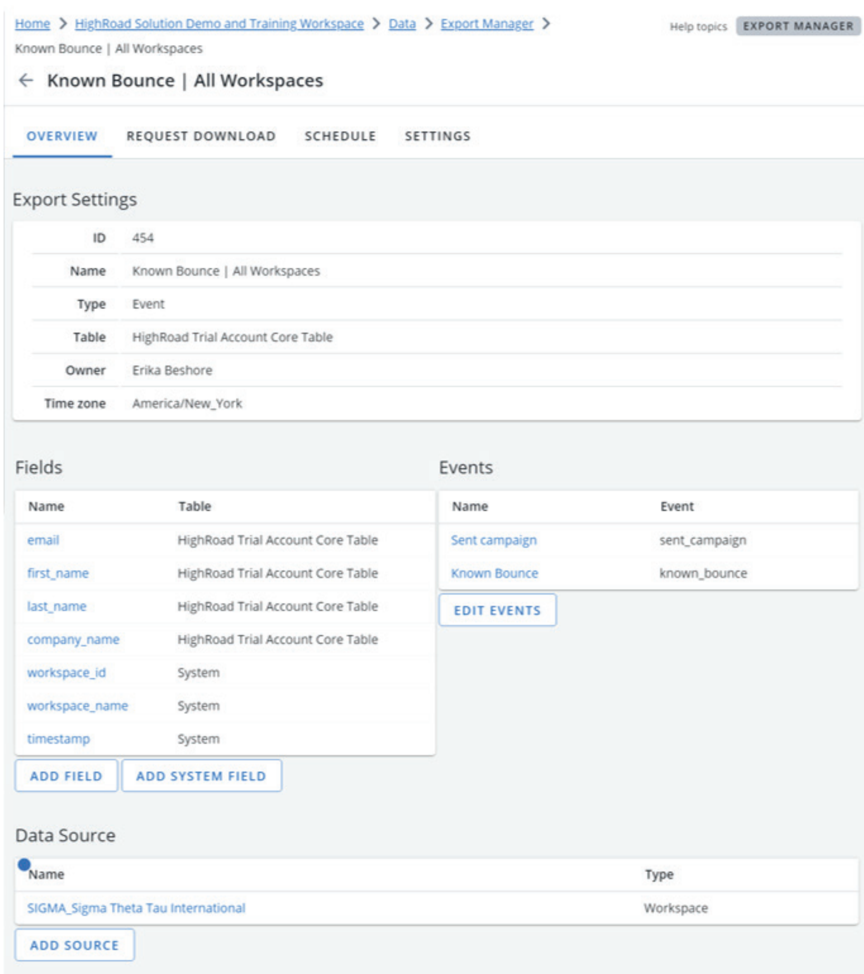
Note: There are three types of export you can create; **event history**, **contact** and **device & location**.

5. Click 'SAVE'

Export Overview

Export Overview contains three main parts; fields, events (not required for device & location exports) and data source, which you will need to configure for each export you create.





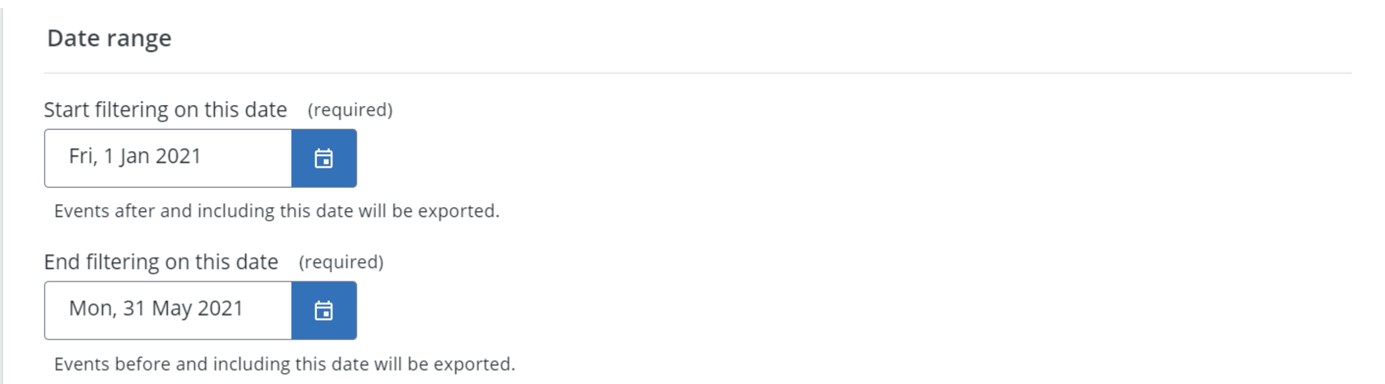
1. Click the ‘Add Field’ button; and pull in the fields you will need from the core table. **Note** that you do have system fields options like the option to pull in a contact created date.

2. Next, you will select your event data the system.
This might be as simple as opens and clicks and can go deeper into deliverability questions around bounced emails.

3. **Select your data source.**
You can choose the entire workspace and portfolio of all of your emails or you can narrow it down to only one project of emails.

4. **Exporting & Scheduling**
You have the option to request the download immediately by tabbing over to request a download.

   a. **Request download**
   Data exports can be requested on an ad-hoc basis via the 'Request Download' tab. You will need to define the date range of the events to be exported, by selecting an inclusive start and end date.

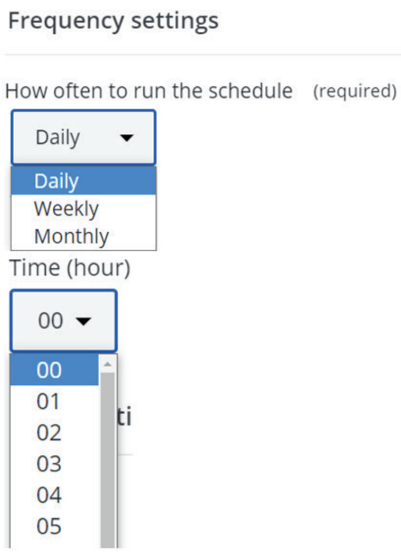


   The format of the output file will be CSV Once you have specified the criteria, clicking ‘Request’ will begin the export process.

   b. **Schedule Export**
   Using the ‘Schedule’ tab data exports can be scheduled on a recurring basis, and Marketers can specify how often they are sent and by what method.

Frequency

Frequency settings defines how often your export will send. Default settings is daily, you can change using the drop-down to weekly, or monthly. If you send weekly, you are given the option to specify which day of the week you wish the export to send. Monthly, Marketers can specify which day of the month.



c. **Data Settings**

The data settings of your export relates to the feed type and the format of the final output file.

d. **Feed Type**

Exports can be one of two feed types:

- **Incremental**: exports run sequentially, with only the most up-to-date data being sent each time, according to your frequency settings. We recommend running incremental exports as this means the output file size is considerably smaller.

- **Full**: exports run cumulatively, with the entire dataset being sent each time.

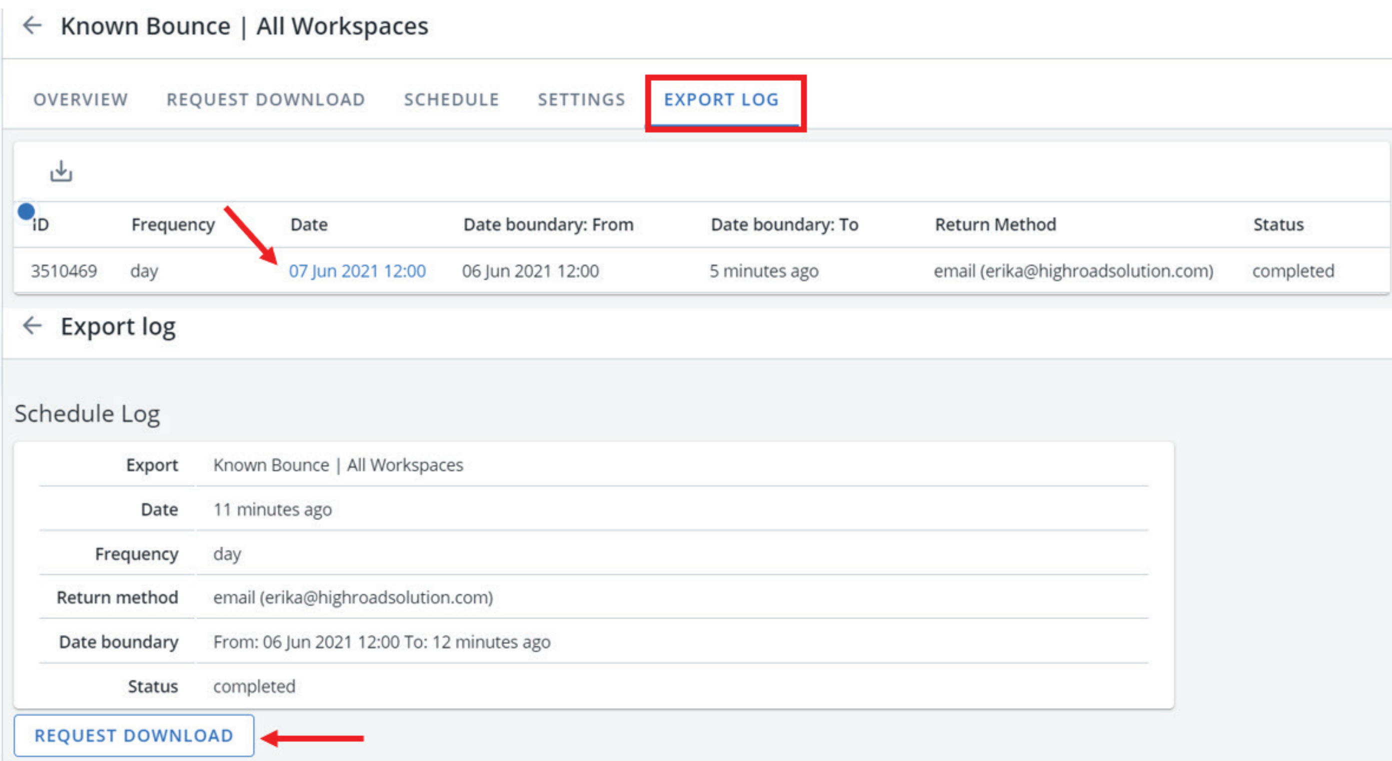
e. **Format** The format of the output file needs to be CSV/Text. The form will display the delimiter format drop-down box for you to select your preferred delimiter.

We recommend using the default format, which is comma delimited CSV.

Export Log

Once your export has been scheduled, the 'Export Log' tab will be available. This displays the history of your export and will initially be empty until your schedule starts running.

Once the schedule is enabled, each data export will be listed in the export log. Clicking on an individual data export will open the schedule log, where you can download the data again using the 'Request Download' button. When your export is ready to download you will be sent an email, which will contain a link to where you can download it. This may take some time if it is a large export.



More resources:

- Adestra Roadwork
- Client Care Support Documentation
- Client Care:

    Available: Monday – Friday 7:30 am – 6:00 pm ET

    Email: support@highroadsoltuion.com

    Phone: 703-297-8886