

Exploring Which Email Solution is Right for Your Organization: Mailchimp, Constant Contact, SendGrid, HubSpot and Others

Presented by:

Randy Richter

Association Technology Solutions

About ATS

- ✓ Serving iMIS community since 1995
- ✓ Full-service Authorized iMIS Solutions Provider (AiSP)
- ✓ Application development to extend the functionality of iMIS
- ✓ iMIS Bridge powered by ATS with integrations to over 150 vendor platforms
- ✓ Over 100 RiSE website designs and implementations
- ✓ iMIS EMS upgrade specialists supporting dozens of iMIS EMS clients wither starting out in EMS or migrating to EMS.



Presenter:

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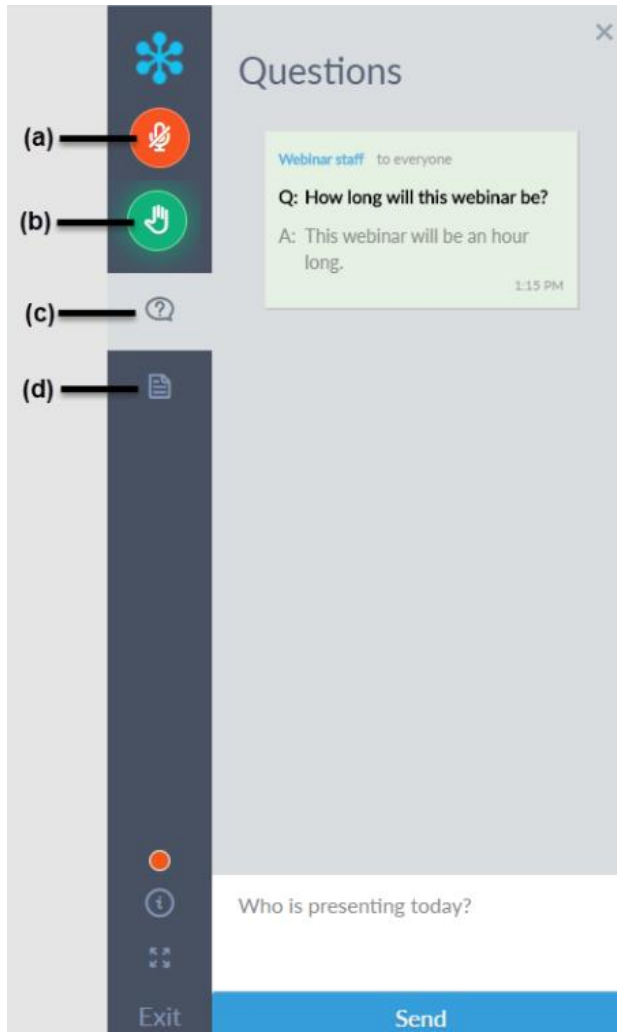
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Moderator:

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Sales Manager

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- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts
(not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation is complete

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Session

- ✓ This session will discuss some of the components for email and text services
- ✓ We will discuss some of the considerations when setting up your email and text campaigns
- ✓ We will discuss the differences in some of the third-party tools



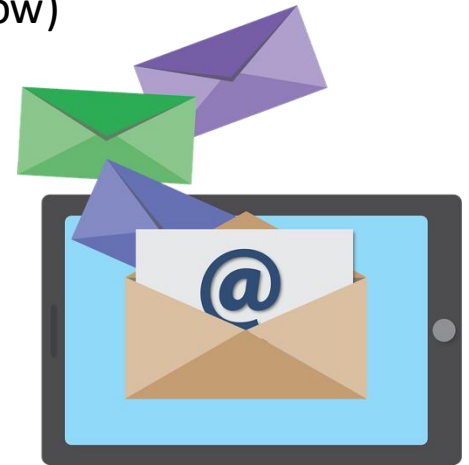
Email communications are essential

- ✓ Newsletters
- ✓ Welcome emails
- ✓ Renewals
- ✓ Surveys
- ✓ Holiday messages
- ✓ Event messages



Types of email communications

- ✓ **Transactional** (individual triggered the action)
 - ✓ New member welcome
 - ✓ Here is your receipt
- ✓ **Informational** (because you are a member, we want you to know)
 - ✓ Here is the ballot for the board of director election
 - ✓ Members can now access our new job board
- ✓ **Promotional**
 - ✓ Please register for our conference/webinar
 - ✓ Please consider purchasing this study guide



Email considerations

- ✓ Who should get an email?
- ✓ When should they get the email?
- ✓ Have they opted in/opted out?



Broadcast Email ecosystem components

- ✓ Lists of contacts (people)
- ✓ Lists that the people are on (done with segmentation)
- ✓ List of tags/attributes (member/non-member) (new member) (vip donor)
- ✓ Opt in/Opt out Email delivery system





List of contacts

- ☑ Typically, an IQA query that lists demographics about the person

Show all 22

ID	EMAIL	LNAME	FNAME	ISAMEMBER	STATUS	GENDER	City	LASTSYNC	UNSUBURL
194	info@atsol.org	MANAGER	MANAGER	True	A		Alexandria	11/13/2024 4:18 PM	CommunicationPreferences?CPToken=
23220	benz@atsol.org	Zastrocky	Ben	True	A			11/13/2024 4:18 PM	CommunicationPreferences?CPToken=%2bWsrTjtOvKz6j5GpTxTqO
23724	tsloan@atsol.org	Sloan	Tim	True	A		Arvada	11/13/2024 4:18 PM	CommunicationPreferences?CPToken=yFFn3MDhsu3pBNNRtoET6A9



Segmentation

- ✓ Strategies
 - ✓ Segment in iMIS via different IQA's
 - ✓ Send all contacts to mail system and do segmentation in that system
 - ✓ Hybrid approach



Segmentation in iMIS

☑ Done through filtering

Intelligent Query Architect



Summary Sources **Filters** Display Sorting Template

Filters allow you to narrow the number of search results down by adding conditions and constraints on the type of data to include in your query. Don't worry, you'll get to select which columns actually appear in your query next.

Add Condition

Where Where Not

Property	Function ⓘ	Comparison	Multiple ⓘ	Value	In Search? ⓘ	Search Label	
[CsContact] Email	None ▾	Contains ▾		@atsol.org	No ▾		✕
Add a filter ▾							

And And Not **Or** Or Not

Property	Function ⓘ	Comparison	Multiple ⓘ	Value	In Search? ⓘ	Search Label	
[CsContact] Email	None ▾	Equal ▾		Constant ▾ noexit@gmail.com	No ▾		✕
Add a filter ▾							





Segmentation in third party (e.g., MailChimp)

- ☑ Done through segment builder

Regular segment builder

Filter contacts for **ATS-CloudTesting**

☰ Segment Filters

Paid Through ▼ is before ▼ 2024-12-31 📅

+ Add filter



Should you segment in iMIS or Third Party or Both?

- ✓ Some third-party mail systems charge per unique email and some charge per unique email per list. That means if a person is on two lists, it counts as two contacts in some systems and only one in another.
- ✓ Consider primary business rules to be defined in iMIS (e.g., IS MEMBER) so that can be used for segmentation instead of having the person doing the segment have to add each member type and check paid through
- ✓ Consider having some core demographics in iMIS such as “Total YTD Donations” instead of sending all donations to the mail system for someone to have to use a formula to calculate that.

Source of Truth Considerations

- ✓ Consider source of truth
- ✓ Are all contacts in iMIS?
- ✓ How do you remove someone from a mailing list that is no longer in iMIS?
- ✓ How do you record actions (open/click) about someone who is not in iMIS?

Tags/Interests

- ✓ Consider things that are 0 to many
 - ✓ Committee assignments
 - ✓ Webinar registrations
 - ✓ Product purchases
- ✓ These can then be used for segmentation in the third-party application

Intelligent Query Architect

Attendance INTERNAL →

Define **Run** Report Group Security

◀ ◀ 1 2 3 4 5 6 7 8 9 10 ... ▶ ▶ Page: 1 of 387

ID	TAG
142	SPR07
147	SPR07
216	SPR07
190	SPR07
149	SPR08
235	LDC09
18043	HRLAW

Opt-in/Opt-out/Unsubscribe

- ✓ Most third-party systems require a global opt-out on their platform
- ✓ You can add your own unsubscribe and send the person back to the iMIS communication preferences
- ✓ IQA's can be adjusted to remove unsubscribes and communication preferences
- ✓ Data could be used with process automation/forms to solicit resubscribes.

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This is a test list for Cloud Bridge testing.*

Our mailing address is:
Association Technology Solutions
4704 Harlan St
Denver, CO 80212-7415

[Add us to your address book](#)

Want to change how you receive these emails?
You can [update your preferences](#) or [unsubscribe from this list](#).

Communication preferences

I would like to receive:

- Invitations to educational opportunities
- Promotional communications
- Monthly news
- Notices of volunteer needs

Unsubscribe from all

You may unsubscribe from these communications at any time.

Save

Cancel

Platform Options

- ✓ iMIS Advanced Email Plus
 - ✓ Integrated into iMIS, records a copy of the email on the individual's record
- ✓ Higher Logic Informz
 - ✓ Supports Email
 - ✓ Records unsubscribes, opens, clicks, bounces in iMIS
- ✓ Higher Logic Real Magnet with iMIS Bridge
 - ✓ Supports Email
 - ✓ Records unsubscribes, opens, clicks, bounces in iMIS



Platform Options

- ✓ Mailchimp integration with iMIS Bridge
 - ✓ Supports Email and SMS Texting
 - ✓ Records unsubscribes, opens, clicks, bounces in iMIS
- ✓ Constant Contact integration with iMIS Bridge
 - ✓ Supports Email
 - ✓ Records unsubscribes, opens, clicks, bounces in iMIS
- ✓ Hubspot integration with iMIS Bridge
 - ✓ Supports Email
 - ✓ Records unsubscribes, opens, clicks, bounces in iMIS



Platform Options

- ✓ Twilio Sendgrid integration with iMIS Bridge
 - ✓ Supports Email and SMS Text
 - ✓ Records unsubscribes, opens, clicks, bounces in iMIS
- ✓ Medallia Concierge integration with iMIS Bridge
 - ✓ Supports two-way texting
- ✓ VoterVoice integration with iMIS Bridge (Q4 2024)
 - ✓ Supports Email
 - ✓ Supports engagement tracking in iMIS



Commonalities/Comparisons

- ✓ All are driven by IQA queries
- ✓ All record engagement (e.g., open, clicks, unsubscribe)
- ✓ All (using iMIS bridge) support iMIS communication preferences for opting in/out
- ✓ Some support texting
- ✓ All support segmentation of some type
- ✓ All that use iMIS Bridge have solid two-way integrations

What does AI say about them?

Best For:

- **Constant Contact:** Good for small to medium businesses needing simple, effective email marketing with easy segmentation.
- **Mailchimp:** Ideal for users looking for advanced segmentation and robust automation, with more flexibility and integration options.
- **HubSpot:** Great for businesses looking for an all-in-one platform with strong CRM and deep segmentation, especially for B2B or large-scale operations.
- **SendGrid:** Best for transactional emails and simple marketing campaigns with basic segmentation, especially for developers and businesses focused on email deliverability.

Each platform has its strengths, so the choice will depend on the complexity of your segmentation needs, your CRM requirements, and the type of campaigns you plan to run.

Example Use Case

- ✓ Send a message to all potential registrants and exclude anyone that has opted out or has already registered
- ✓ Create an IQA in iMIS that includes all prospects
 - ✓ Remove anyone who has opted out of “promotional emails” from the IQA
 - ✓ Remove anyone who has already registered from the IQA
- ✓ Alternatively send a different message to people who
 - ✓ Received the email and didn’t open it
 - ✓ Received the email and opened it

Example Use Case

- ✓ Send a message 3 days after someone joins
 - ✓ Add the join date to the contact demographics
 - ✓ Using segmentation send an email if the current date is three days past the join date/transaction date.

What are the factors to consider?

- ✓ Cost (platforms have different licensing levels)
- ✓ Ease of use when
 - ✓ Creating Templates
 - ✓ Managing segmentation
 - ✓ Scheduling/Sending emails
- ✓ Segmentation (more experience in IQA's or more experience in third-party tools)
- ✓ Deliverability
- ✓ Automation (e.g., automatically send messages based on actions)

Additional Information about iMIS Bridge

- ✓ Modules have pages that discuss how they work
- ✓ Some have videos and webinars describing the use
- ✓ Supported use cases are listed on the website
- ✓ Contact us for additional use cases or questions

- ✓ <https://www.atsol.org/imisbridge>
- ✓ sales@atsol.org



www.atsol.org -> products -> iMIS Bridge



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