Guide to Automating Your Communication

Optimising Business Efficiency with Relevant Messaging on Auto-Pilot

Introduction

Automated communication isn't just about automation anymore. It's grown into a fully integrated, multi-channel form of customer journeying that connects systems with people, pre-defined scenarios, and behavioural triggers.

In this guide, we'll explore why automated communications are so critical to business success and the three levels of data collection that you can use to trigger, personalise, and customise your customers' journey.

We'll also provide examples of how other businesses are using automation at these levels and look at what to consider when compiling your own automation workflows.

What You’ll Find in This Guide

Why Automate?

In today's instantly gratifying world, automation is more than a buzz word… it's essential to your business success. Here are a few reasons why:

Customers Expect it:

These days, customers expect a personalised response within an hour. But many companies still haven't tried automating this. This guide will help you fill this gap.

It Boosts Business ROI:

Harvard Business Review says "marketing and sales costs average 15% to 35% of total corporate costs". So, any efficiency improvement here boosts total business ROI. It also means you get the most out of your specialists – reallocating budget to initiatives that improve returns.

It Nurtures Relationships:

Whether you're communicating with potential clients or existing ones, responsive, personal, relevant messaging helps you have engaging and meaningful conversations with people when they expect it. And that's always good for business.

It's Multi-Channel & Scalable:

With the right platform, you can pre-build responsive communication journeys across multiple channels. And omnichannel journeys like this can grow and scale as you do with the same amount of administrative effort.

It Saves Time & Resources:

Manually sending emails is time consuming if you're managing them one at a time. Not to mention, it keeps top talent focused on administration, instead of strategy – an inefficient and expensive use of resources.

It's Measurable:

Automated communication platforms like Everlytic enable you to monitor campaigns on every level. On the macro level, you can track messages by campaign. If you're looking for granular stats, you can also view reports by message, customer, and workflow node (learn more about workflows in the next section: How Automation Workflows Work).

Read More on Our Blog

Why Automate? (cont.)

Marketers using automation have seen:

90%
Higher customer retention rates

14.5%
Increase in sales productivity

70.5%
Higher open rates

77%
Increased conversions

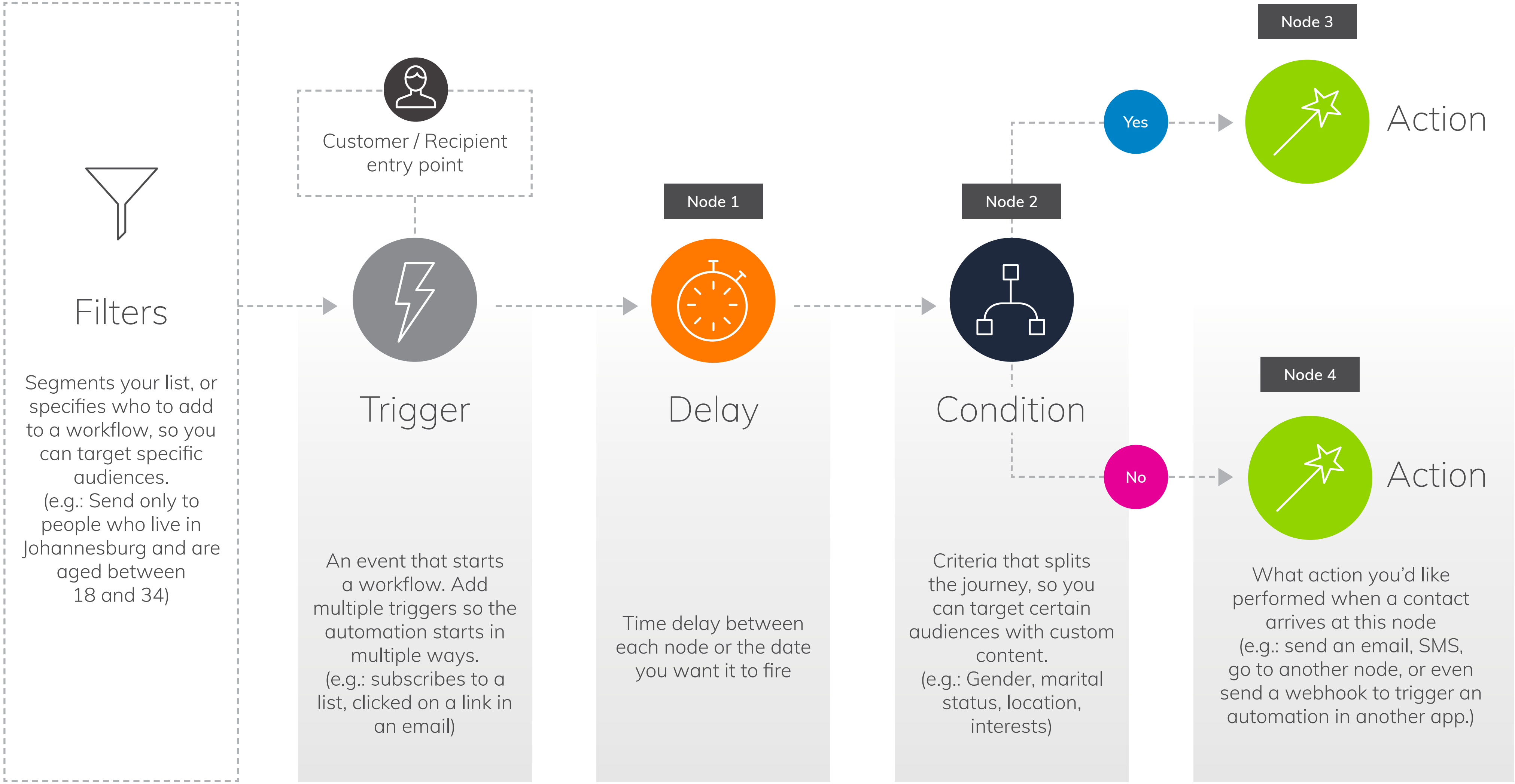
12.2%
Reduced marketing overheads

152%
Higher click-through rates

Source: Instapage

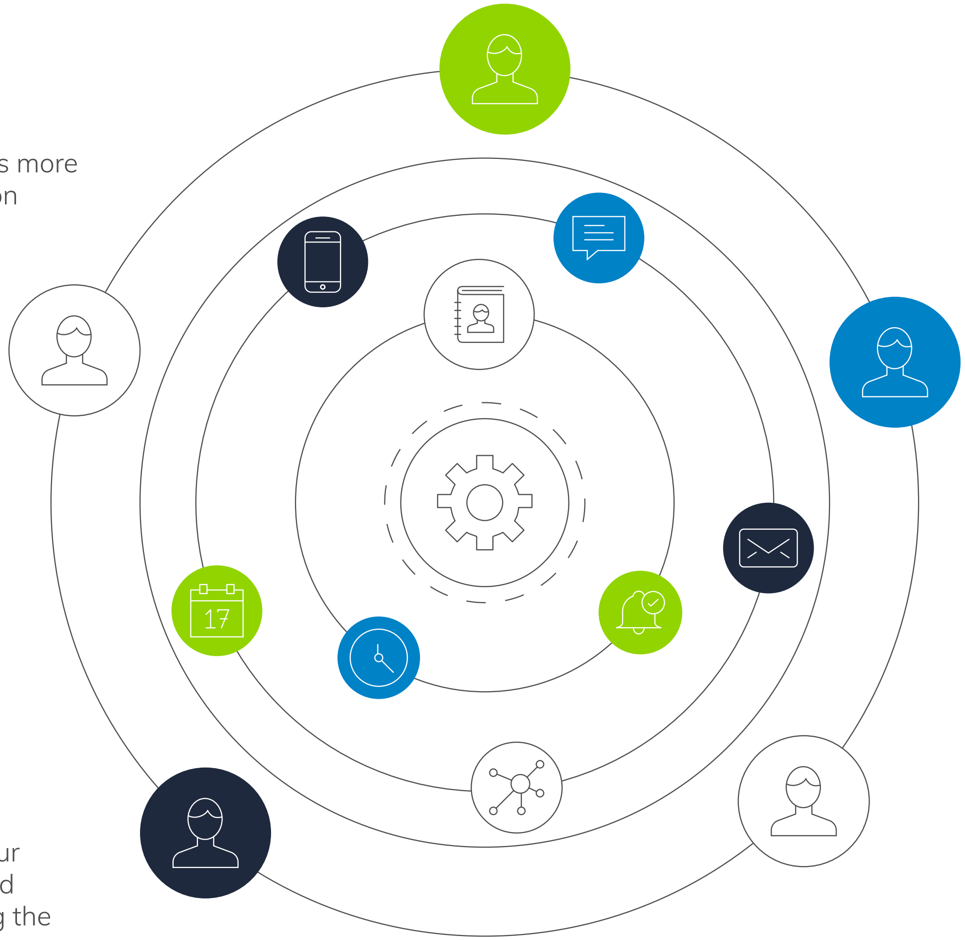
How Automation Workflows Work

In communication automation, a workflow is the term used for a communication journey. It's an advanced version of a drip campaign (which sends messages with time delays), only it also includes intelligent functionality like conditions, data filters, and a range of actions for truly exceptional automation. Here's an infographic to show you the basics:



Levels of Automation

We define automation as the automated triggering and sending of messages. It includes more than just personalisation within one email, but the customisation of entire communication journeys. The three levels of communication automation are:



Level 1

Using Your Contact Data

For any automated journey to work, you need data – and to start, all you need is an email address. The more useful data you collect on your contacts (like name, gender, location, interests), the more hyper-personalised and targeted your messages can be.

Level 2

Customer Behaviour Tracking

This is the next level of automation, where you track how your contacts interact with your messages and use that as data. This enables you to change course when necessary and respond to your contacts with relevant messaging when they want or need it, improving the customer journey.

Level 3

Integration Across Systems

This is the ultimate level of automation as it pulls and pushes data from other sources, like your CRM or ecommerce platform. It simplifies your life by automating your database updates, allowing you to nurture and convert potential leads, increase revenue, save time and admin, and boost productivity.

Look Familiar?

The data you collect and use to personalise your messages can also be collected and used to automate it. So, if you've read our personalisation guide, you'll probably know these levels as different data-collection methods.

Level 1

Using Your Contact Data

Data is the basis of all communication automation. Some of the best features you can use at this level are the ones we cover in detail in our personalisation guide (though there are some great automation examples in the pages to come too). Some of these include:

Personalisation

This is about talking to an individual using their own unique data and it goes beyond just greeting them by name. With the right information, you can personalise content like points balances, appointment dates, and any other specifics that are relevant to the individual.

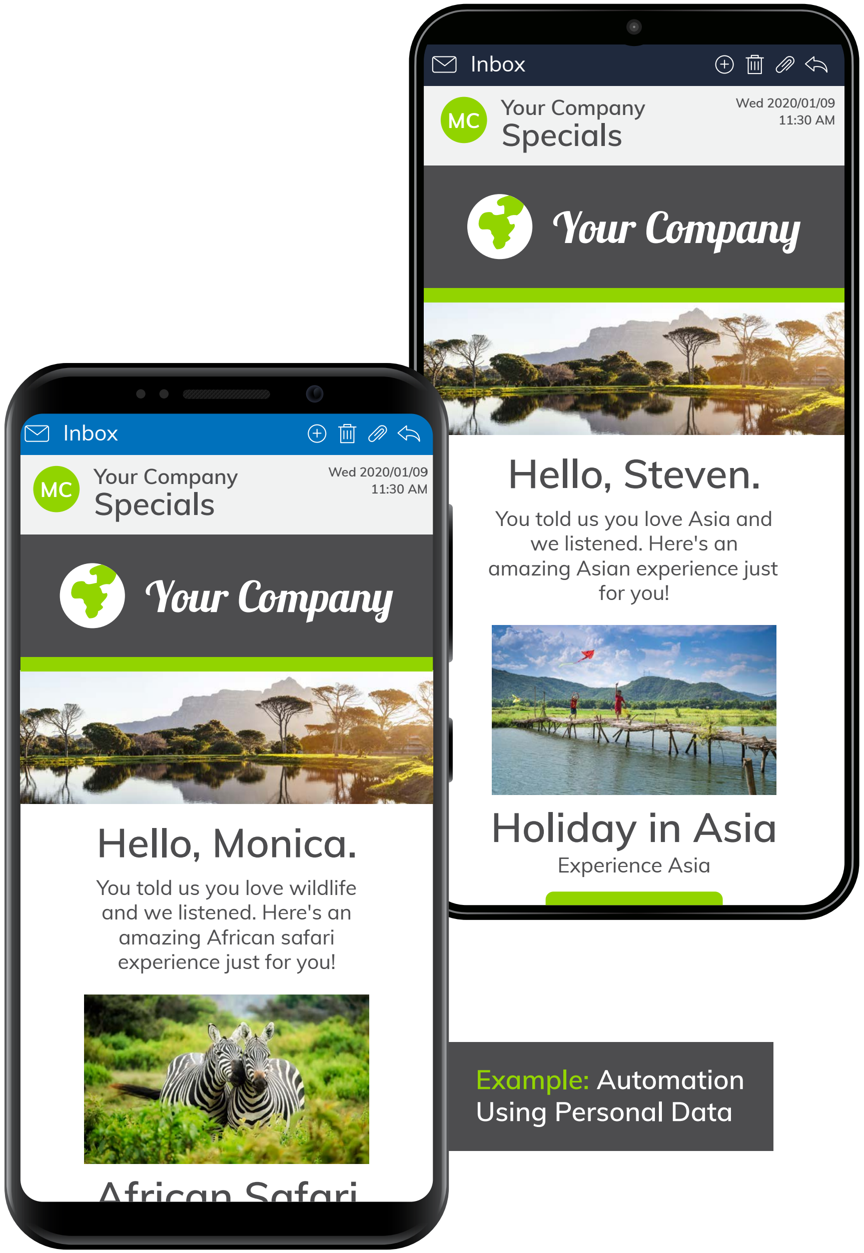
List Segmentation

This separates people into groups, recognising that many contacts in your list will overlap in terms of needs, interests, and their stage of the buying cycle. When you filter your contacts by data fields like location, gender, marital status and more, you can ensure that they only receive messages relevant to them.

Dynamic Content

This enables you to build one email with multiple sections for different audiences and programme the system to send each section only to the segment of your list that it applies to. It basically applies an ‘if statement’ to a section of content in your email. Only if the contact meets the criteria will they see it.

This simplifies the content creation process by allowing you to create one email for all your contacts while ensuring that the content in it is customised when received.



Example: Automation Using Personal Data

Example: Automation Using Dynamic Content

Flight Centre Boosts Website Traffic from Email by **388.72%** with Dynamic Content

Flight Centre created a personalised experience for users by sending them emails customised to their travel destinations, buyer personas, travel interests, and purchase history.

This dynamic content increased open and click-through rates, which had a powerful impact on website traffic.

Read the Case Study

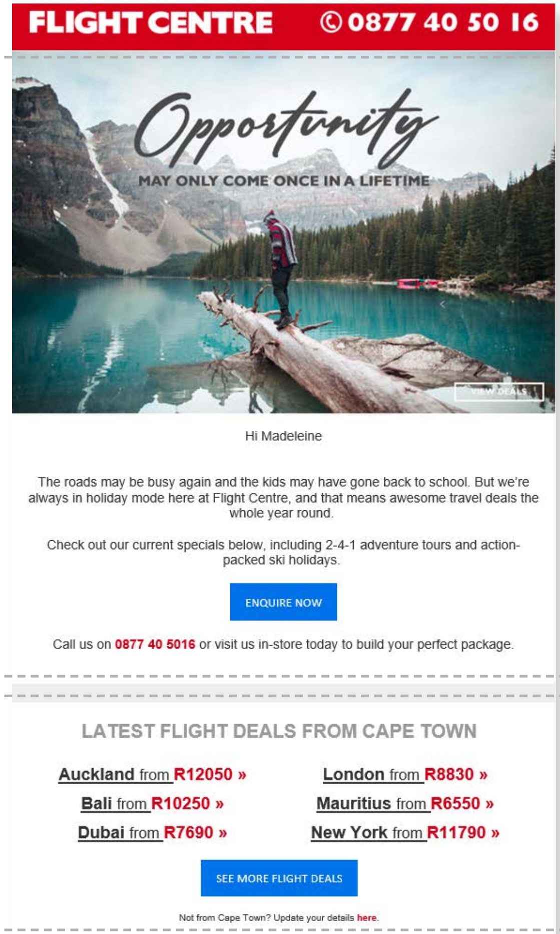
How to Do This in Everlytic

To customise which segments of your audience see a section of your email:

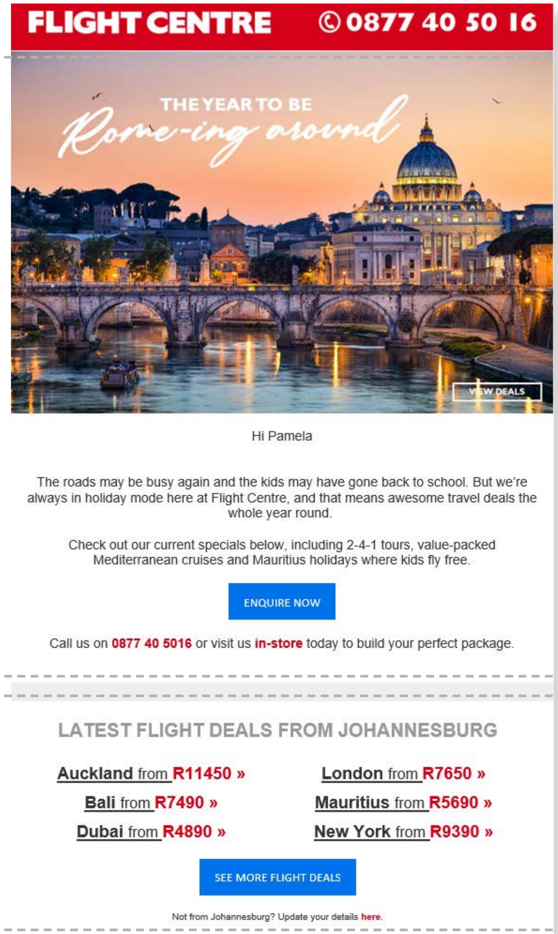
1. Hover over the full layout section that you want to make dynamic.
2. Click the *Add dynamic statement* button.
3. Select the data category, field, condition, and value of the condition you want the recipient to meet to see the section.
4. Click *Save*.

Read detailed instructions

Email example to a person from *Cape Town* with an *adventurous* travel persona.



Email example to a person from *Johannesburg* with a *luxurious* travel persona.

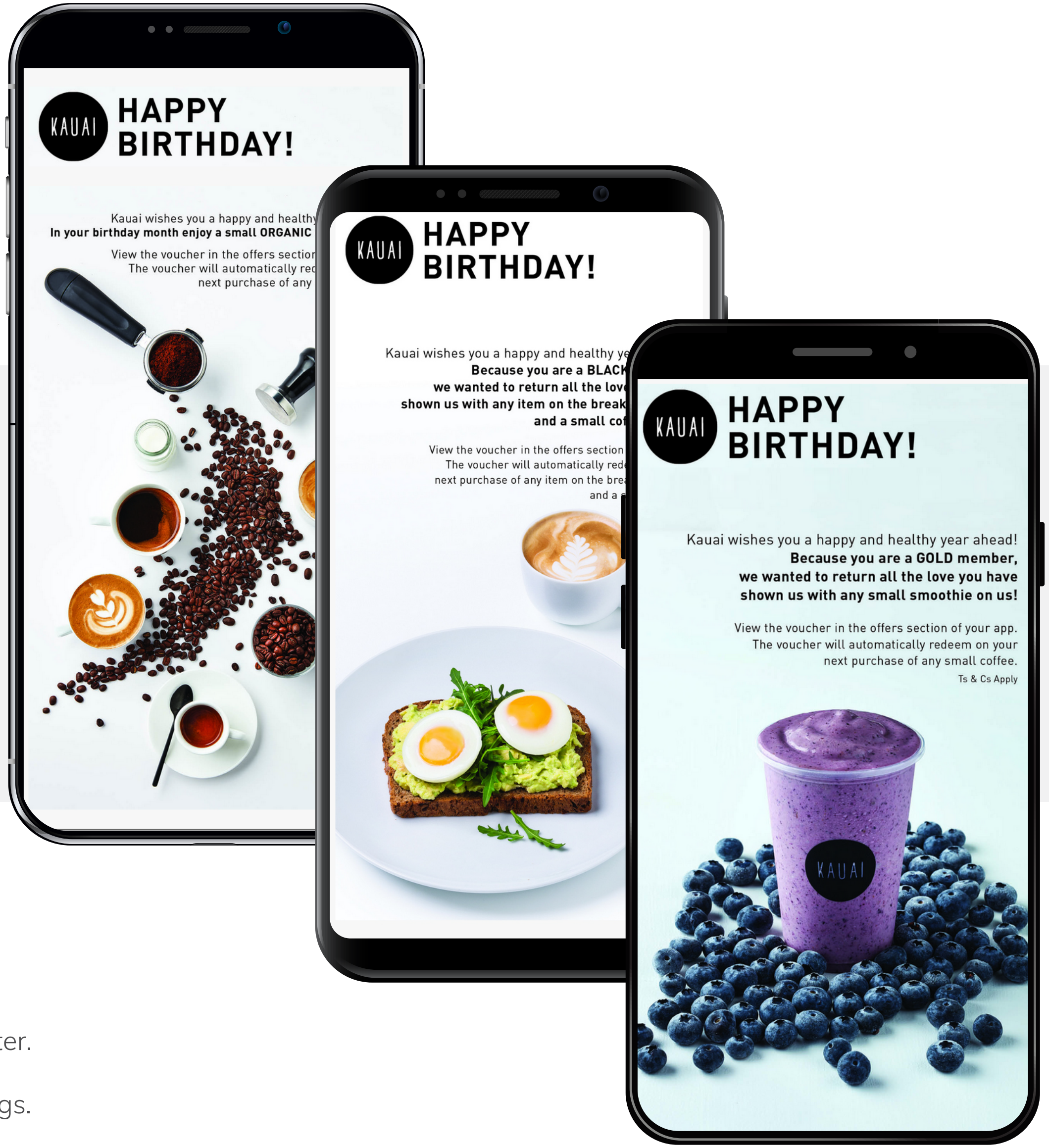


Dynamic Content based on Interests

Dynamic Content based on Departure Point

Date-Related Mailers

If there's a specific date on which something special happens for you or your contacts, you can automate messages to go out before, on, or after this date. This can be helpful for birthdays, anniversaries, appointment reminders, or events.



Example: Automation by Date

Kauai Sends Rewards-Level Customised Birthday Mailers

Kauai sends automated birthday emails with a voucher that's customised to which loyalty tier the person is on in their rewards programme. This enables them to send bigger rewards to their most loyal clients, nurturing brand advocacy.

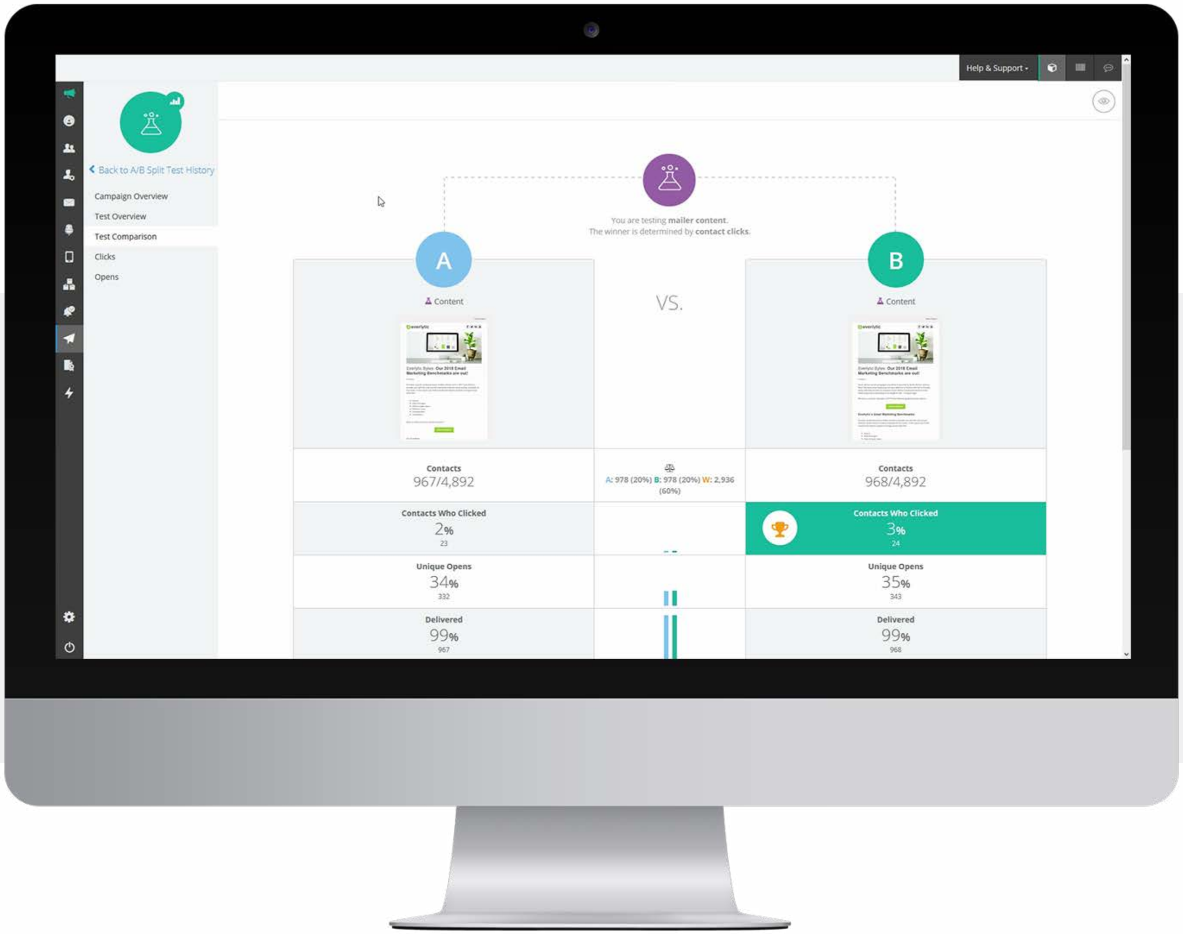
How to Do This in Everlytic

1. Start creating a workflow.
2. Enter the basic properties of your workflow.
3. Select the anniversary workflow type.
4. Specify the date field that you'd like to trigger your workflow before, on, or after.
5. Add in any messages, delays, or conditions that you'd like in the workflow.
6. Specify which lists you'd like the workflow to apply to and any delivery settings.
7. Launch the workflow.

Read detailed instructions

A/B Testing

Knowing what your email readers respond to best is a constant trial and error. But, with automation, you don't have to do it one email at a time. A/B testing allows you to test two versions of an email in one send – cutting your testing time in half.



Here's how it works:

A/B testing sends each version of your email to a small percentage of your database for a period before the final mail is scheduled.

During this time, the platform tracks engagement on each version of the mail to see which one performs best. When the time is up, the system automatically sends the strongest email to the balance of your contacts.

How to Create an A/B Split Test

1. Fill in your test properties & select your contact lists.
2. Specify what you'd like to test & provide the relevant content.
3. Specify the percentage of your list that you'd like to send mailer A, mailer B, and the winner mail to.
4. Select if you'd like the winner determined by opens or clicks & how long you'd like to run the test.
5. Customise delivery options like email footers, tracking, and scheduling.
6. Review your A/B test settings & send.

Read detailed instructions

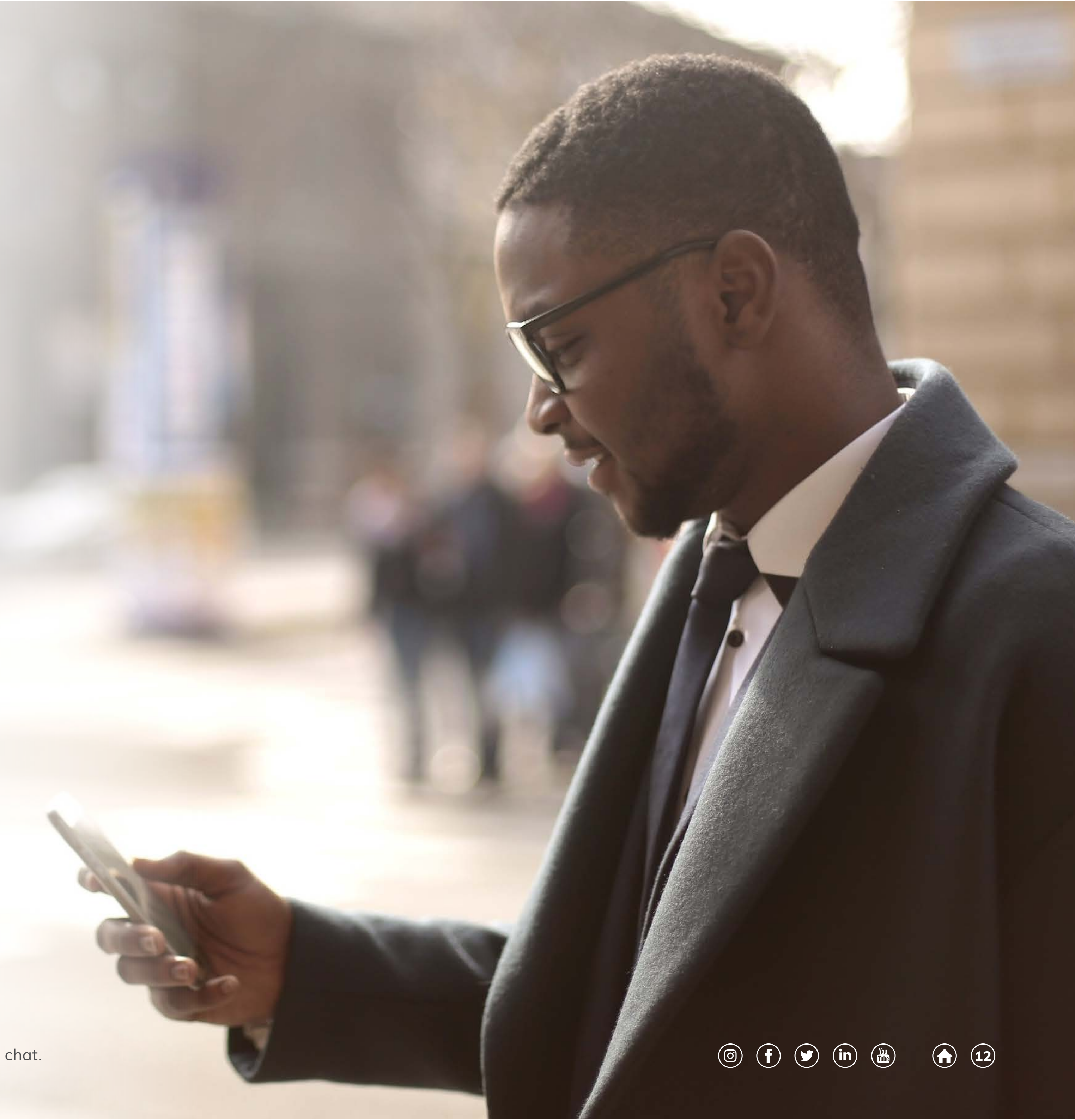
Level 2

Automating by Customer Behaviour

Automating with data can only go so far when you're asking someone to fill out a form, but a lot of people lose sight of one of the best ways to collect data on a contact and automate communication with it: by tracking their behaviour and interaction with your messaging.

Tracking behaviour requires you to have a database and be interacting with clients already.

Examples of customer behaviour you can track on your communications include the following...



List Subscription

This starts a workflow when a contact is added to a list in your database (e.g.: your newsletter database).

Use this to start a contact's communication journey. Here are some examples:

- Nurturing new leads
- Onboarding new customers
- Engaging with and upselling to existing customers
- Educational campaigns

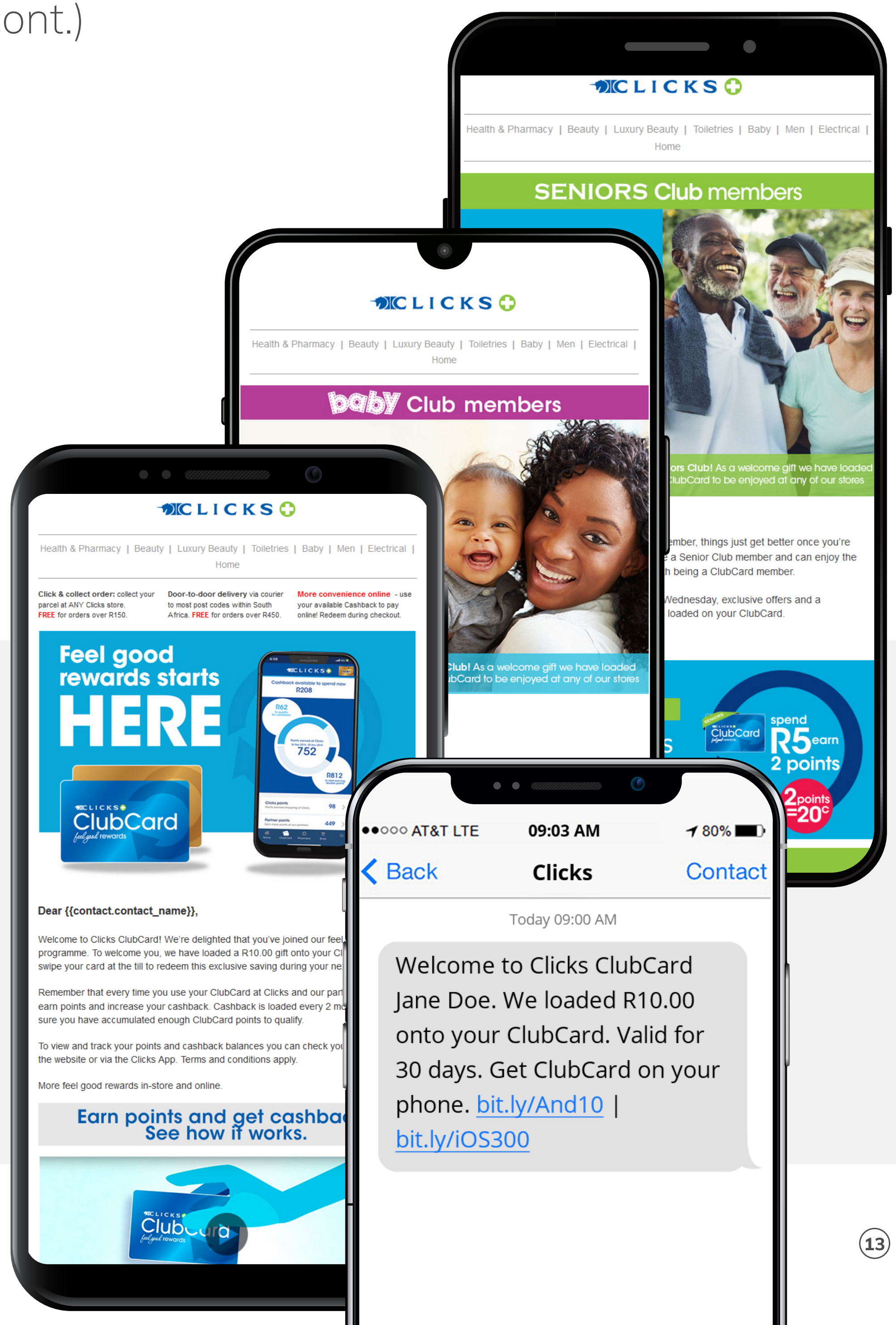
Example: Automation by List Subscription

Clicks Welcome Messages

Clicks uses Everlytic to send welcome emails and SMSs to new contacts when they sign up for communications. This ensures all their contacts receive a personalised welcome, no matter what channel they signed up with.

The messages are also customised according to whether the contact is a ClubCard, Senior, or Baby Club member, welcoming them to Clicks and offering them a R10 voucher to get started.

From here, the emails are educational, reminding customers to use their ClubCard to increase their points and earn cash back. This incentivises customers to keep coming back.



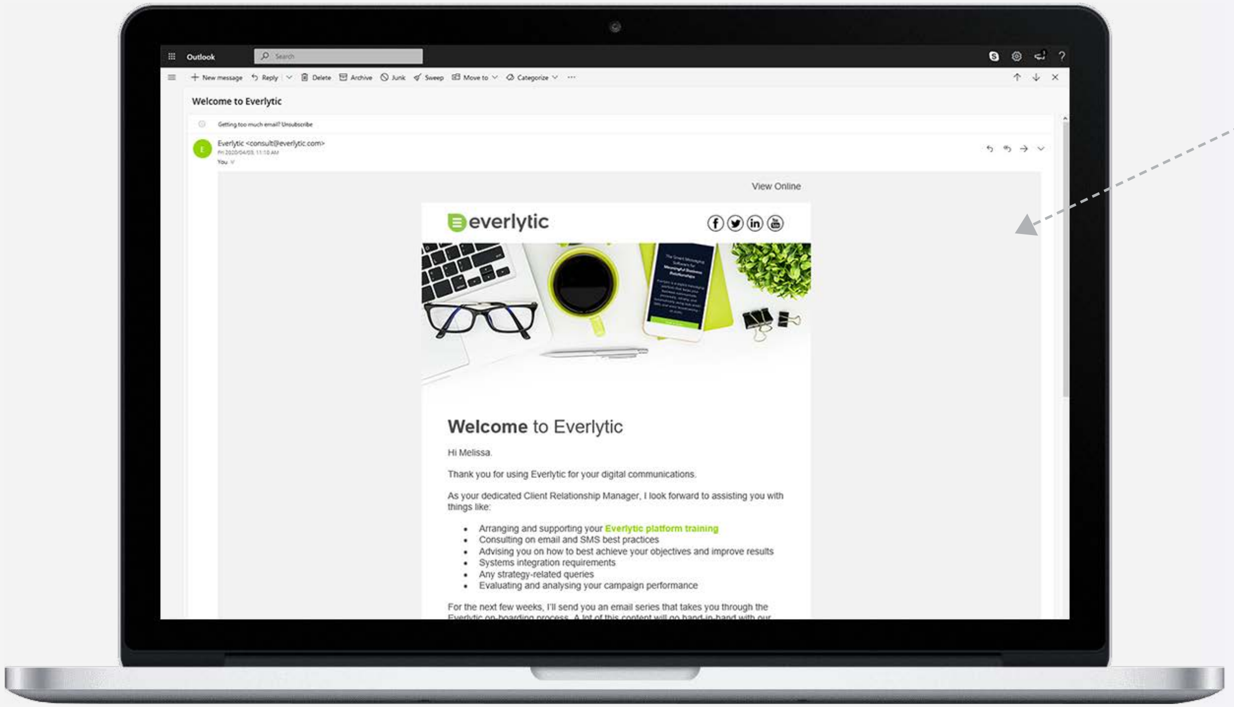
Level 2 Automating by Customer Behaviour (cont.)

Example: Automation by List Subscription

Everlytic Onboarding Series

At Everlytic, we use a 10-email workflow to onboard all new clients to our platform. It sends dynamic content depending on what package the client is on and, if the client has a Relationship Manager, it sends from the relevant Relationship Manager's email address.

This helps us automate and personalise the onboarding process, ensuring that every new client gets the tools they need to get started.

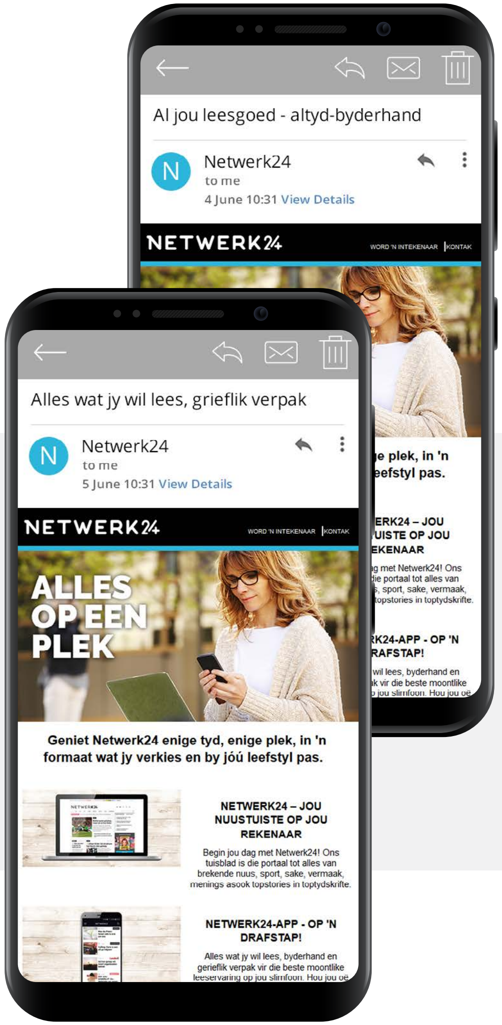


Email / SMS Engagement

This triggers a workflow when a contact reads or clicks on a link in one of your emails or SMSs. This trigger is very flexible because you can specify the exact email / SMS and apply it to a specific link in that message. You can also apply a filter so it only applies to a specific list of contacts.

Use this to:

- Track contact engagement
- Set a condition, so contacts who engage go down a specific path
- Update the contact's data and segment your list
- Trigger follow-up messages ("You didn't sign up for the webinar...")



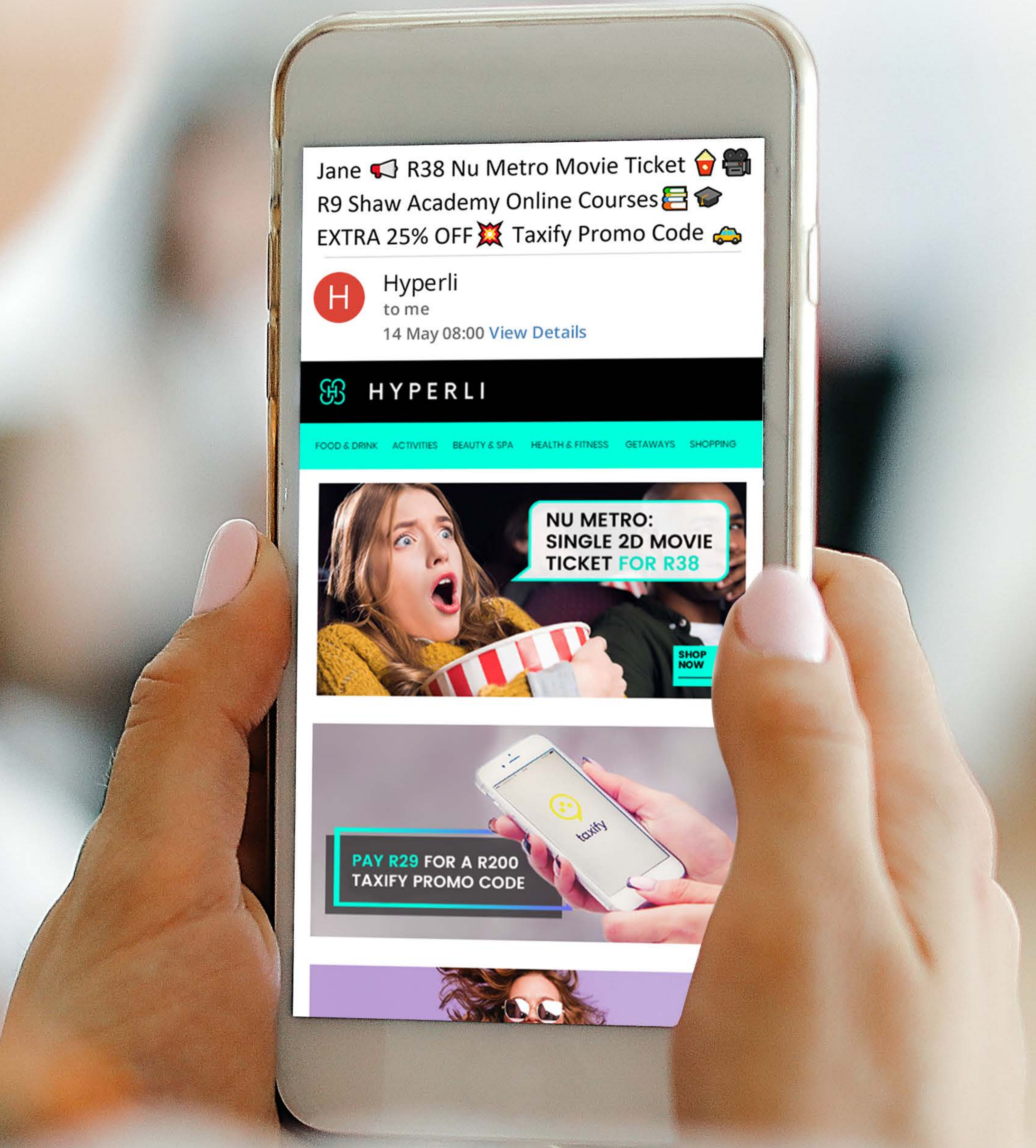
Example: Automation by Message Engagement

Netwerk24's Trial-Month Workflow

Netwerk24 uses Everlytic to add contacts to a workflow when they sign up for a trial month. If a contact doesn't open an email or click on a link, the platform sends a different email, or sends the same one with a different subject line. If a contact doesn't show interest on one path, they use go-to nodes to direct them down another path that they may prefer.

This intricate communication journey recognises that every client is different, tweaking the path for the individual. This means that Netwerk24 can customise the experience for each contact, communicating in a way that works best for everyone.

By tracking engagement, you can start tracking your audience's interests without needing them to fill out a form to tell you. This helps you get the most out of your existing customers, keeping them engaged, and upselling them on products and services they like most.



Example: Automation by Message Engagement

Hyperli Re-Engages Inactive Contacts

Hyperli comes at engagement from a different angle: by tracking which customers *aren't* engaged. This enables them to send enticing campaigns just to these audiences, bringing cold contacts back to life.

Read the Case Study

Landing Page Engagement

Landing pages are often used as extensions of your campaigns. You can track if a contact views, doesn't view, clicks, or doesn't click on the content on your landing page and use that to automatically trigger customised messages.

Use this to:

- Send triggered communications based on a contact's engagement on a landing page
- Update a custom field with contacts' interests

Example: Automation by Landing Page Engagement

Create Customised Journeys Based on Your Contacts' Page Views

Your business is multi-dimensional. To connect with contacts on the topics and pain points that mean the most to them, bundle the content you have on these subjects and trigger customised messages when they land on specific landing pages.

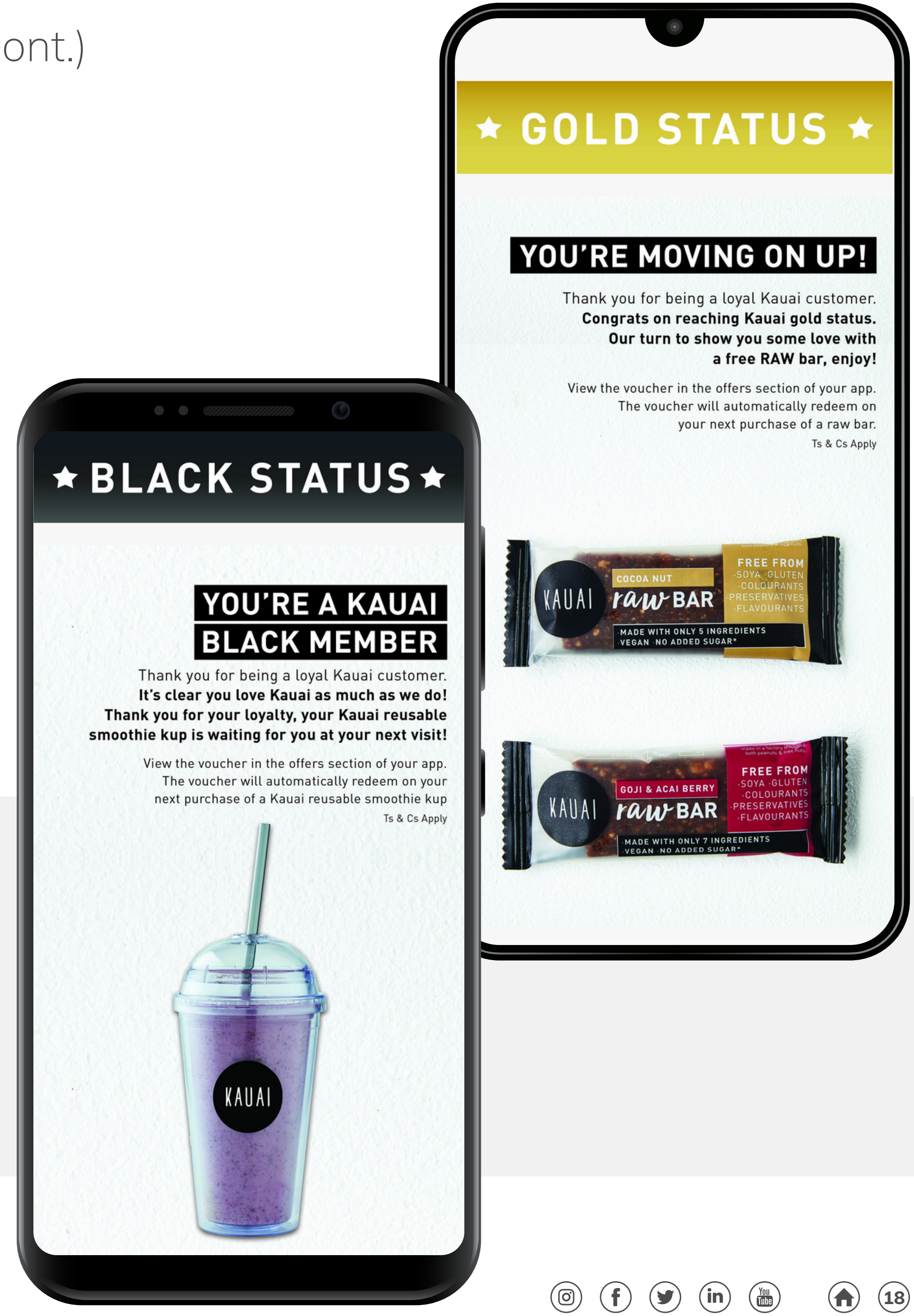
For example, if one of your contacts views a landing page for an eye-care product, you can trigger a mail with more eye-care content and benefits, related products, or services that you have available.

Field Change

Use this to trigger an action when a data field is updated. It works if a field on an existing contact changes to or from any value (including empty fields) or a value that you specify. It also works well for sending follow-up sequences and notifying people in your organisation that the field has been updated.

Use this to:

- Send follow-up messages based on the updated field
- Inform people in your business that a field has changed
- Add a contact to another workflow, customising the journey according to their position in the funnel



Example: Automation by Field Change

Kauai Contacts Rewards Members When They Move Up a Level

Kauai uses Everlytic to send automated, customised emails to members of their rewards programme when they move up from Kauai's green to gold, and gold to black rewards levels. You can do the same with the field-change trigger.

Shares, Forwards, or Replies

Some systems enable you to trigger a workflow when your email is forwarded, replied to, or shared on social media.

Use this to:

- Inform people in your business that the message was shared
- Thank the contact for sharing your message
- Introduce the contact to your referral programme
- Tag someone as a brand advocate

Dynamic Data Sets

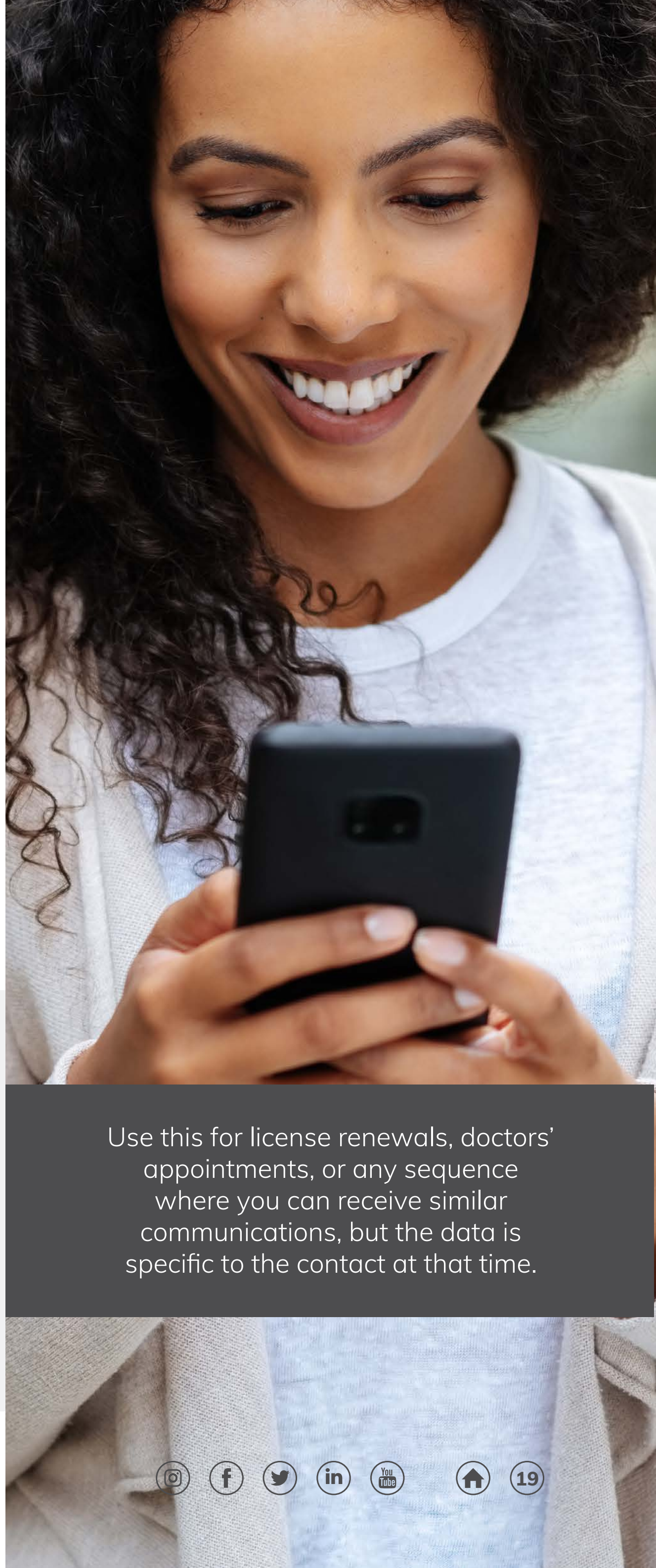
This is an advanced workflow type that allows a contact to exist in the workflow multiple times via API, holding unique data per entry.

Example: Automation Using Dynamic Data Sets

Airline Flight-Booking Workflow

If a client purchases a flight from an airline company, they can get added to a workflow with unique data set fields like flight reservation number and departure date. The client flows through the workflow, receiving the necessary information for those data sets.

The same client can then purchase another flight and get added to the same workflow, but this time the reservation number and departure dates will be different. Both versions of this contact can exist in the same workflow and receive customised emails and SMSs based on each set of unique data.

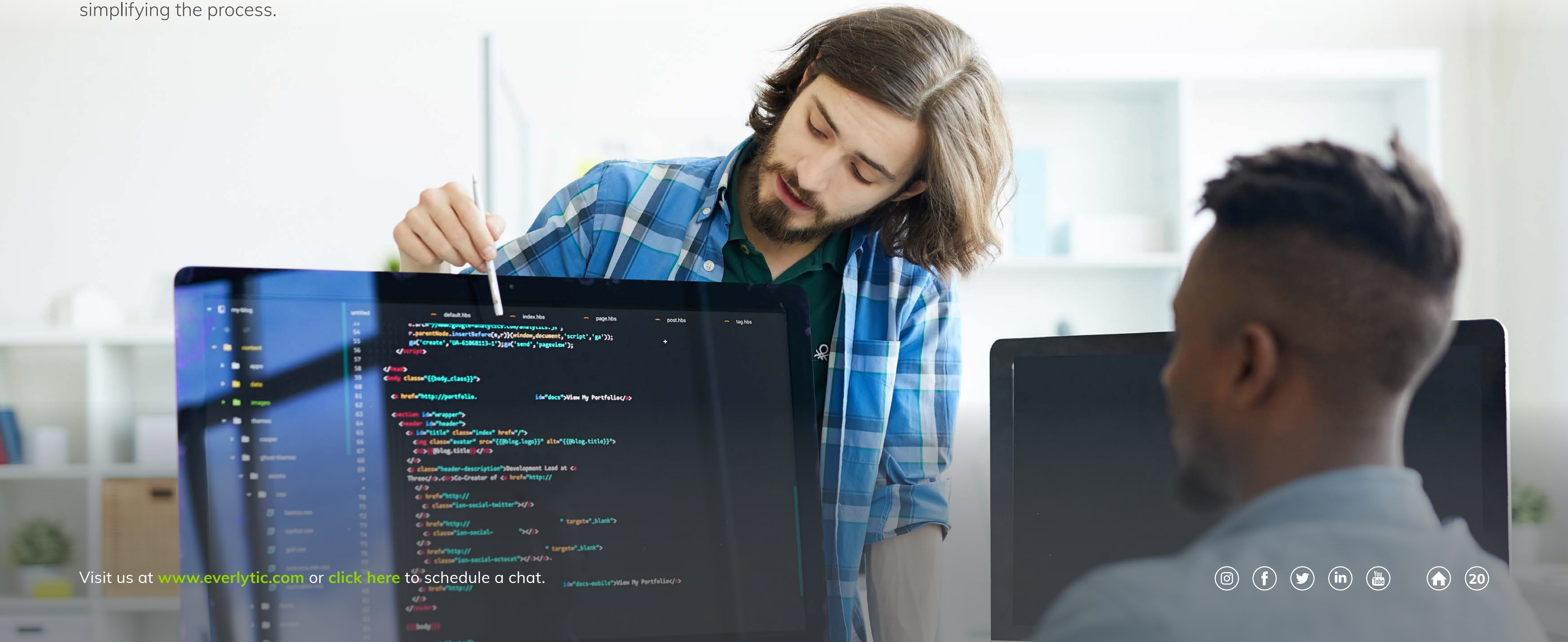


Use this for license renewals, doctors' appointments, or any sequence where you can receive similar communications, but the data is specific to the contact at that time.

Integrating with Other Systems

Integrating your communication automation platform with other systems using an API or pre-built integration takes automation to the ultimate level. These systems can include ecommerce sites like Shopify or WooCommerce, your CRM, your lead monitoring tool, Google Analytics, or even clever tools like Zapier, to give you even richer integration abilities.

On the following pages, we'll explore some of the ways these integrations can help you improve your efficiency when communicating with clients, simplifying the process.



Abandoned Cart Communications

According to The Good, website conversion specialists, more than 75% of online shoppers abandon their carts. But if a customer has gone through the trouble of visiting the site and proceeding to checkout only to leave before paying, they're probably a hot lead – all they need is a nudge. Abandoned cart communications are the best way to do this.

The Good also adds that open rates on abandoned cart emails are close to 50% - roughly double our average open rate.

For best effect, send the first abandoned cart email within an hour of the cart being abandoned to catch the buyer while they're most interested.

Use the guidelines in our eCommerce Automation Guide to automate communications from your store, so you can improve efficiencies and scale.

Integrate with Your CRM

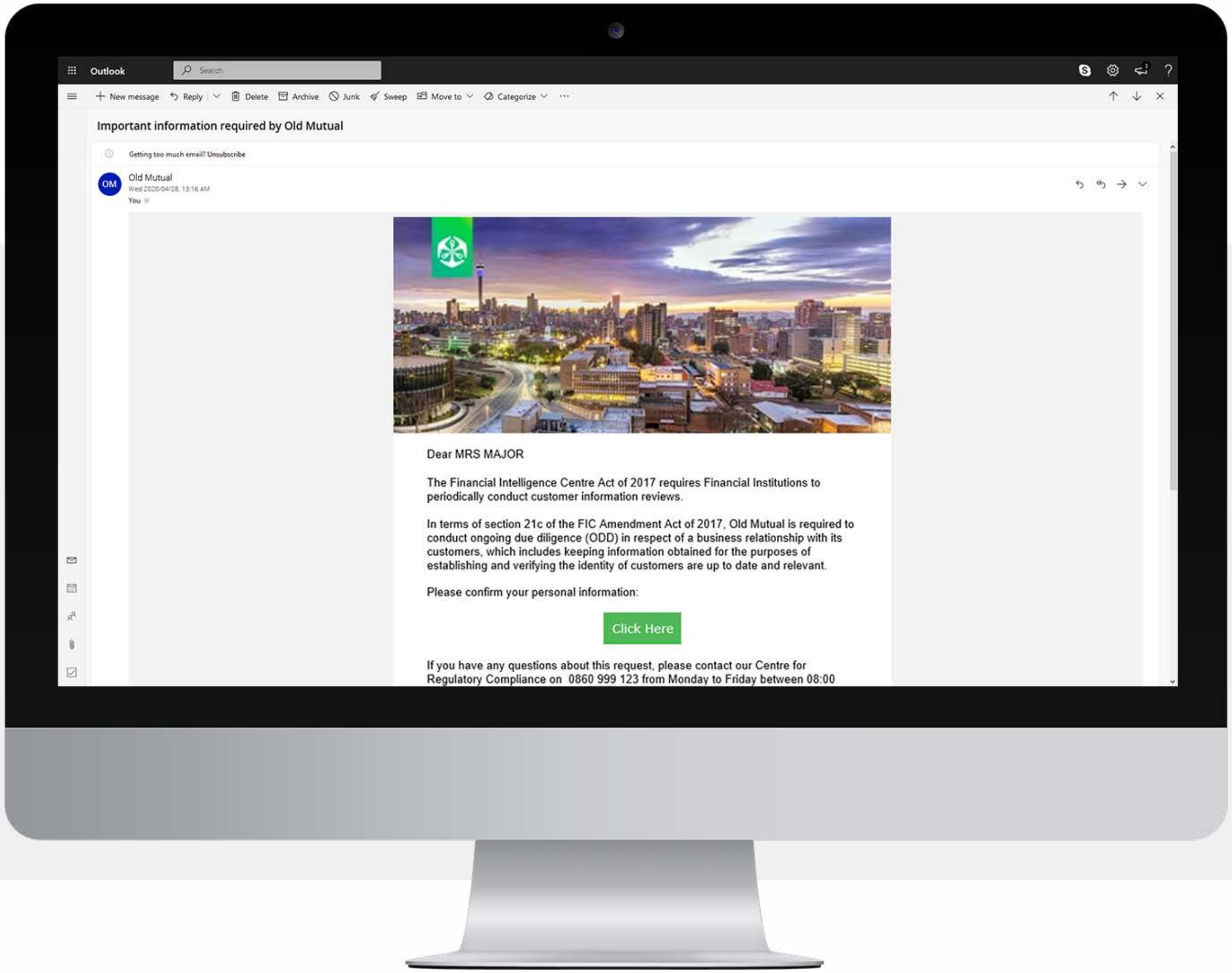
Integrating a platform like Everlytic with your Client Relationship Management system ensures that your data is current, triggering messages in line with a client's position in the pipeline or client lifecycle. This makes your messaging especially engaging, helping you convert more leads and keep them that way.

Example: Automation via CRM-Integration

Old Mutual's Everlytic-CRM Integration

Old Mutual uses Everlytic to send all PR communications to its clients. Once the contacts submit their details on an integrated web page, the data gets pushed to Old Mutual's bespoke CRM. Here, the data is cross-checked for errors. If the data is incorrect or fields are missing, the contacts are added to the workflow again to update their details.

This project is currently being used by multiple divisions in the company, completely abolishing their need for paper-based forms and improving their data-sanitisation process.

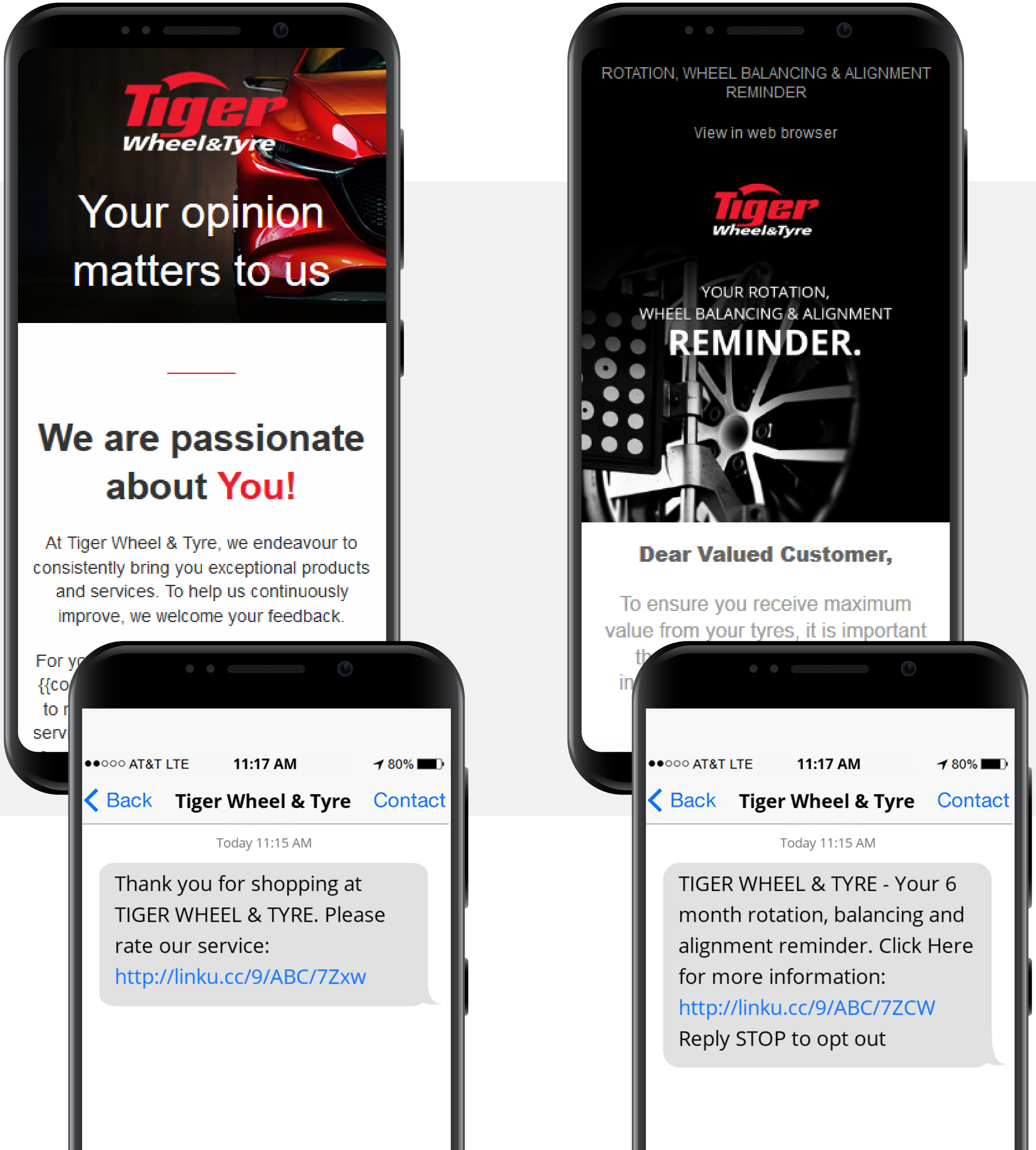


Example: Automation via System-Integration

Tiger Wheel & Tyre NPS Rating Mails

Tiger Wheel and Tyre is not your average tyre and wheel supplier. It uses Everlytic for its NPS-rating emails and SMSs, starting the process by pushing data through the API to our platform. This data import triggers a four-message workflow that targets email and SMS clients on their preferred channels, reminding them to submit their scoring and rate the service received at their network of fitment centres.

Annual and bi-annual wheel alignment, balancing, and rotation reminders get triggered too, reminding customers to book routine inspections at the customer's nearest Tiger Wheel & Tyre.



Automation in Higher Education

A great misfortune in higher education is the high drop-out rate – especially since automated communications can engage students before it's too late. By integrating your communication automation platform with the school tracking system, you can make a difference to students' lives by:

- Nurturing prospective students to sign up
- Onboarding new students
- Triggering communications when students get good or poor results
- Offering support to students who show early signs of disengagement, like skipping classes

The South African education system may not be perfect but getting the most out of the students who are already engaged and enrolled is low-hanging fruit.

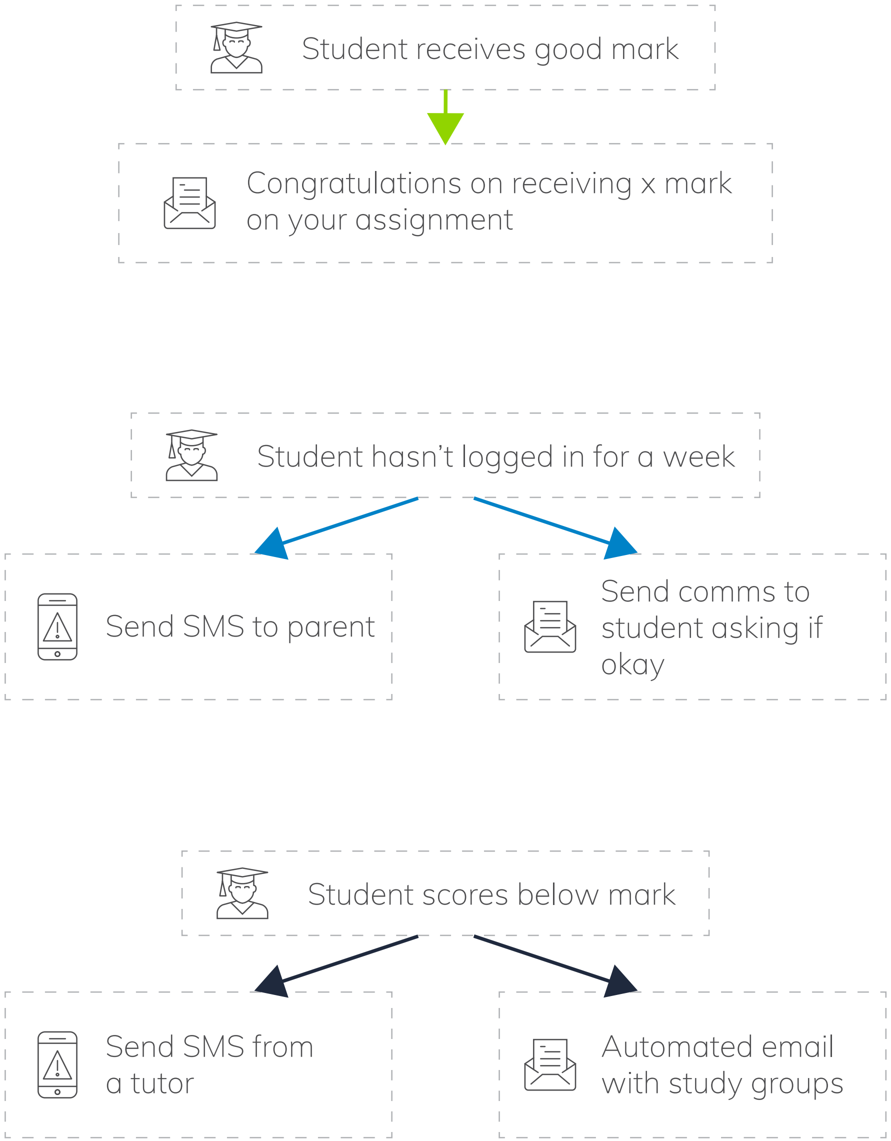
Digital Transformation & Student Engagement:

Changing the Lives of South Africa's Youth

Want to read more about how communication automation can make a difference in students' lives and see some more great workflow examples?

Read Our Article

Examples: Automation via Student-System Integration



Integrating with Google's Ad and Analytics Ecosystem

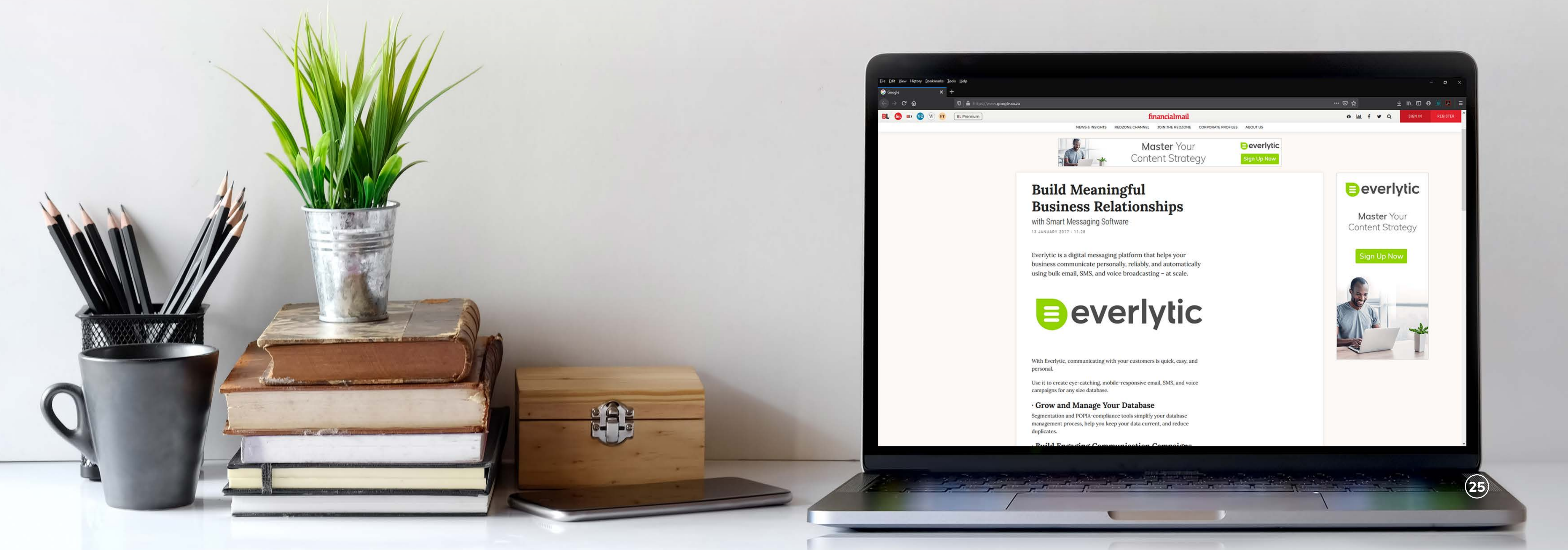
Performance marketing is usually handled separately to direct marketing, but it doesn't always have to. For example, you could:

1 Use Communication Engagement to Inform Your Display Campaigns

You can do this by using UTM parameters to track engagement with your email links in Google Analytics, and using this data to retarget visitors with ads.

2 Push a Single View of a Customer into Your Ad Platform

Engagement data can be exported to a data warehouse to augment the single view of a customer, which can then be pushed to your ad ecosystem.

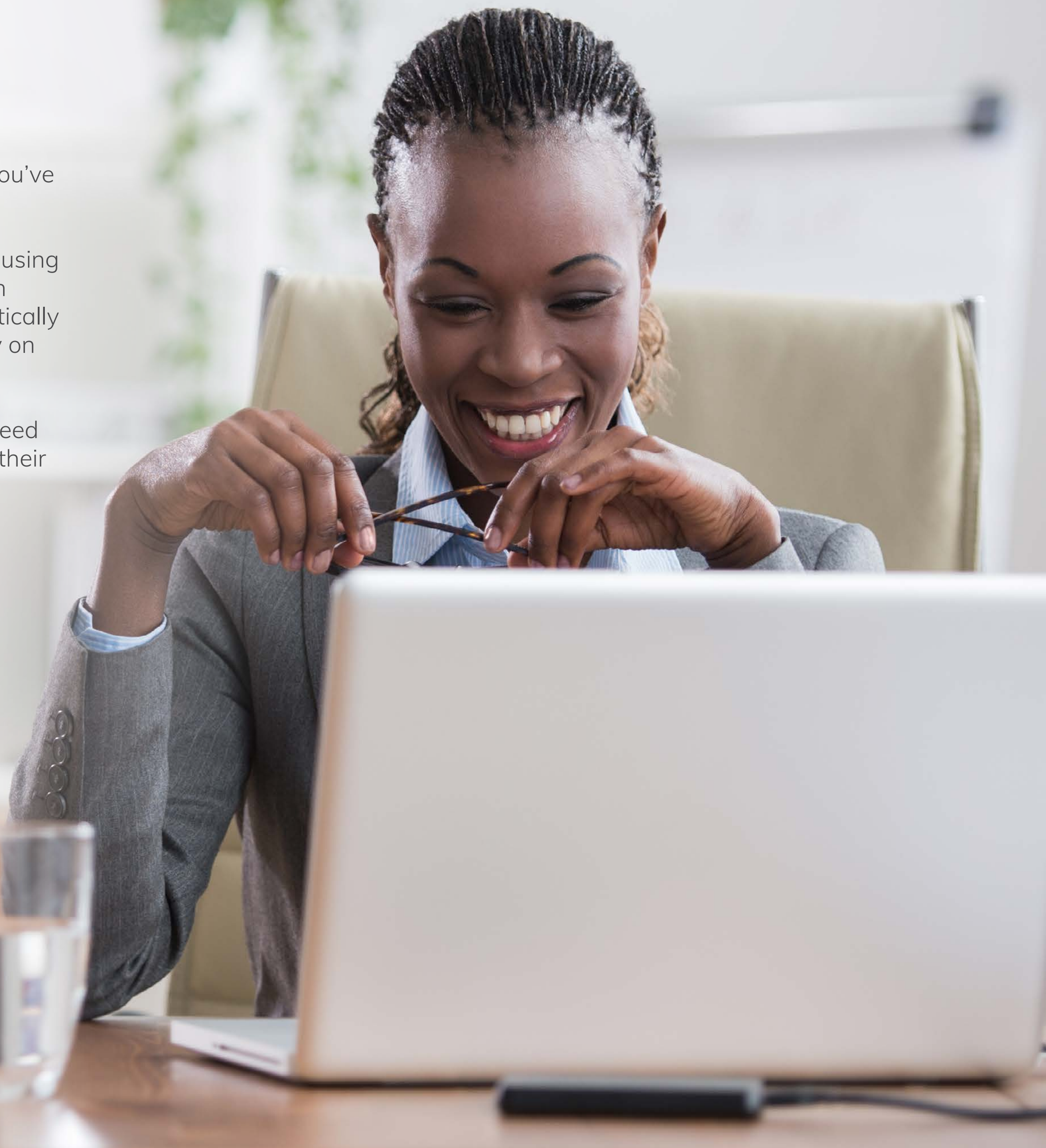


Track Product Adoption & Usage

If you're able to monitor how your clients use and interact with your business, you've got an ideal opportunity to keep them engaged.

For example, in the software or app industry, if you see that some clients aren't using certain features, you can trigger workflows that show them the value and teach them how these features work. For clients who are doing well, you can automatically trigger an email that asks them if they'd be interested in you doing a case study on them.

An integration like this helps you retain clients by supporting them when they need it, rewarding them when they do well, and it helps you attract new clients with their successes. It doesn't get more potent than that.



What to Consider When Building Automation Workflows

If you're just getting started on your own automation workflows, CXL recommends developing a strategy that starts small and solves an immediate problem — like cart abandonment or welcome emails. If you're more experienced, look for where automated communications can better support clients and your internal teams.

Here are four questions they suggest you ask yourself to help decide what and how much to automate:

1

How can you better support your sales funnel?

Are you collecting email addresses from gated content but not doing anything with them? Having customers opt-in for SMS, but not following up? These are the opportunities you can jump on and automate now.

2

How can you support your customers and team?

Direct customers to educational content after they've made a purchase or ask for a review after they've had a product, or used a service, for a while. Alternatively, you can send reminders to patients or follow-ups to leads, so your support and sales teams are less strained.

3

What don't you want to automate?

Handle any channels where you communicate directly with customers (like social media) with care.

4

How are you going to track all this?

Automation platforms like ours give you in-depth reporting metrics that you can use to make informed campaign decisions. And with all the time you'll save on admin, you can focus on strategic analysis like this. Decide what results you want to look at (landing pages, engagement metrics, etc) and what you determine as success.

Automate Your Messages with Everlytic

Everlytic is a bulk communication platform that enables you to personalise and automate messages sent via email, SMS, voice broadcasting, and web push notifications. These are some of the things you can achieve with our message automation features.

Automation Enables You To...

Personalise the Customer Experience

- Personalise the experience at scale
- Trigger & adapt messaging based on contact data, interests & engagement

Communicate at Relevant Times

- Send welcome comms, onboarding journeys & autoresponders
- Reassure clients or prospects of queries received

Connect Personally on Auto Pilot

- Auto-respond when people sign up, send enquiries, or RSVP to events
- Re-engage stagnant buyers

Connect Across Multiple Channels

- Connect on preferred channels by automating journeys across email,
- SMS, voice broadcasting & web push notifications.

Intelligently Nurture Your Leads

- Use workflows and / or integrations to connect with leads at key times
- CRM integrations: Dynamics 365, Zendesk Sell, Pipedrive & Salesforce

Get the Most from eCommerce Shoppers

- Integrate with your eCommerce store and pull products into your emails
- Send abandoned-cart & purchase updates

Conclusion

They say that people don't do business with companies – they do business with people. And it's true. But, in today's highly competitive, fast-paced world, communication automation is the only tool that enables you to give that personal touch your clients crave without physically having to customise and push send on every individual message.

Doing your admin work for you is also just the start of the benefits of automation. With smart tracking and API integrations, the messaging can now be even more personalised than a human could ever manage. With all the data floating around in your systems, it makes sense to use tools that can harness it to create the best experiences for your company, your employees, and your clients.

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