SAN Nurture Program Update

sage

September 26, 2013

SAN Nurture Vision

To conduct all SAN marketing activities under an all-encompassing nurture framework that covers the entire member life-cycle
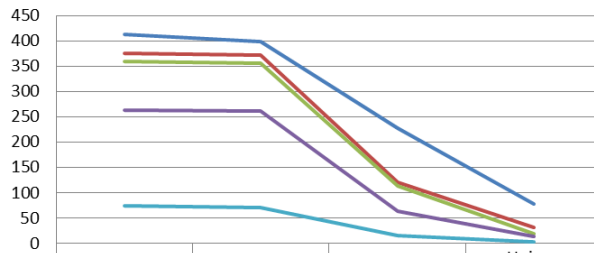
SAN Nurture – To be completed

- – CA FR Welcome Nurture (SAN team)
- – Develop assets for and launch US and CA Prospect Nurture (Content provided by SAN team - RPC to build and launch)
- – Update and segment Prospect Database (RPC?)
- – CA FR Trial Nurture for leads from CA French trial (RPC)

SAN Welcome Nurture Program Results
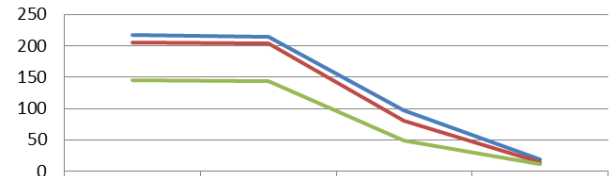

SAN US Welcome Nurture
As of 9/23/2013

	Total Sends	Total Delivered	Unique Opens	Unique Clickthroughs
Welcome Email	413	398	227	77
Week 1 Email	375	372	121	32
Month 1 Email	359	355	113	19
Q1 Email	263	261	63	14
Q2 Email	74	70	15	3

SAN CA Welcome Nurture
As of 9/23/2013

	Total Sends	Total Delivered	Unique Opens	Unique Clickthroughs
Week 1 email	217	215	97	19
Month 1 email	205	203	81	15
Q1 email	145	144	49	11

SAN Trial Nurture Program Results

SAN US Trial Nurture
As of 9/23/2013

	Total Sends	Total Delivered	Unique Opens	Unique Clickthroughs
Trial Nurture Email 1	204	184	45	12
Trial Nurture Email 2	186	183	27	3
Trial Nurture Email 3	185	182	24	1
Trial Nurture Email 3a	185	180	40	1
Trial Nurture Email 4	182	179	23	2
Trial Nurture Email 5	181	178	30	1
Trial Nurture Email 6	179	176	26	3
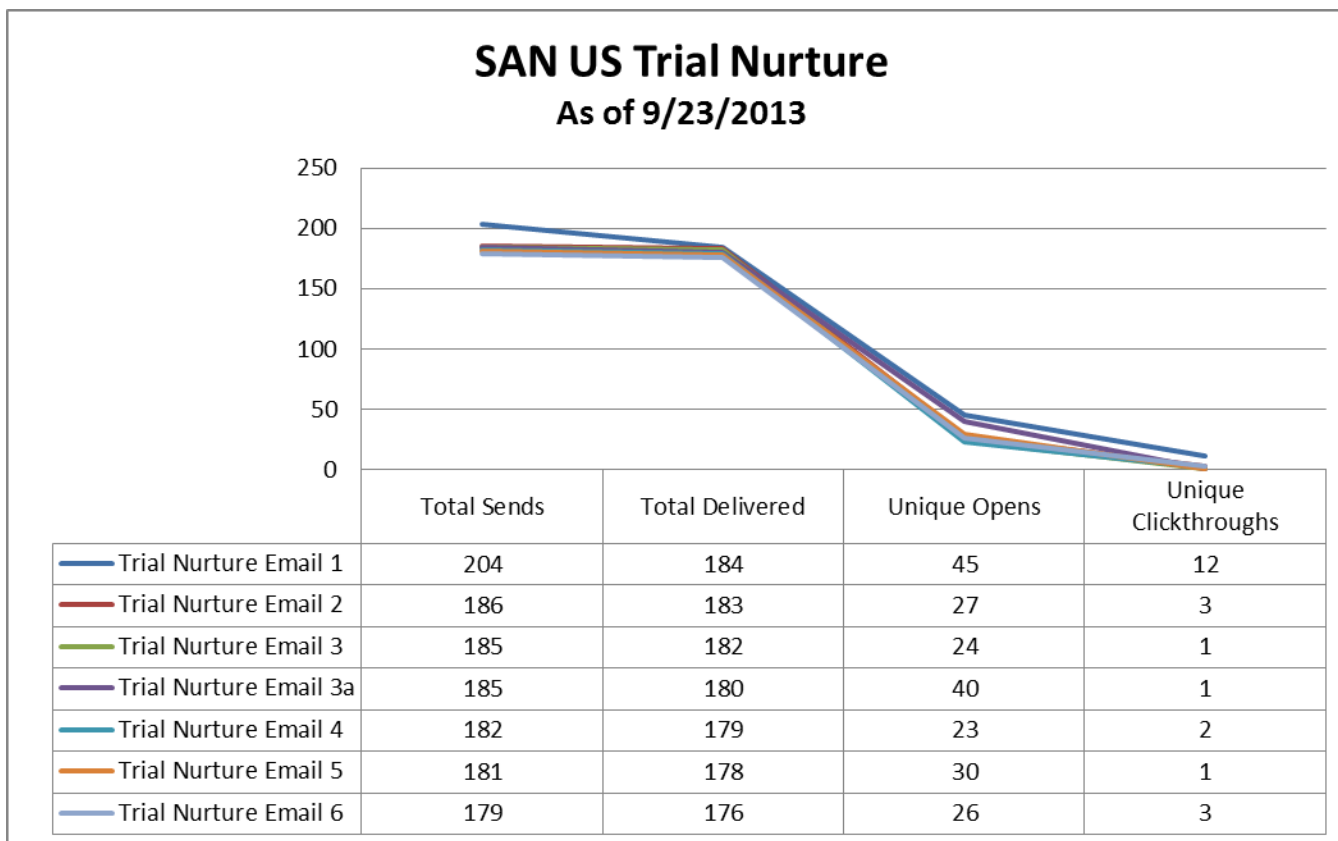
SAN Nurture Current Activities

- **2013**
  - **Renewal Nurture (Launched)**
    - Designed to maintain SAN member base by reminding SAN member that their membership is expiring, and laying out the benefits of timely membership renewal
  - **Trial Nurture (US launched Q3; CA launched Q4**
    - Nurture programs to engage and attempt to convert SAN-eligible prospects who download Sage 50 trials
    - Focused on "how to" information for using software, but each email will also communicate the benefits of SAN membership
  - **Welcome Nurture (US Launched; CA EN Launched; CA FR FY14)**
    - Begins when a new member joins SAN
    - Over the course of the first 9 months of membership, provides new Sage 50 SAN member with information on how to use the software, benefits of membership, and other information that will add value to the first year of SAN membership
    - Goal is to improve the SAN member experience, maximizing the value of the SAN program to the member, to lead to higher renewal rates in subsequent years
  - **Prospect Nurture (Phase 1 launches FY14 Q1)**
    - Prospects will be fed into this stream from the SAN Accountant Database – a database that will, in time, approach all accounting firms in the US and CA
    - Main goal is to provide useful information to SAN-eligible prospects, that will be useful to them whether they join SAN or not; This will establish SAN as a thought-leader and trusted ally in running their firm
    - Each nurture step will include a mention of the SAN program, but will not include hard-sell language in most steps
    - Will eventually include the acquisition program as the first step of this stream

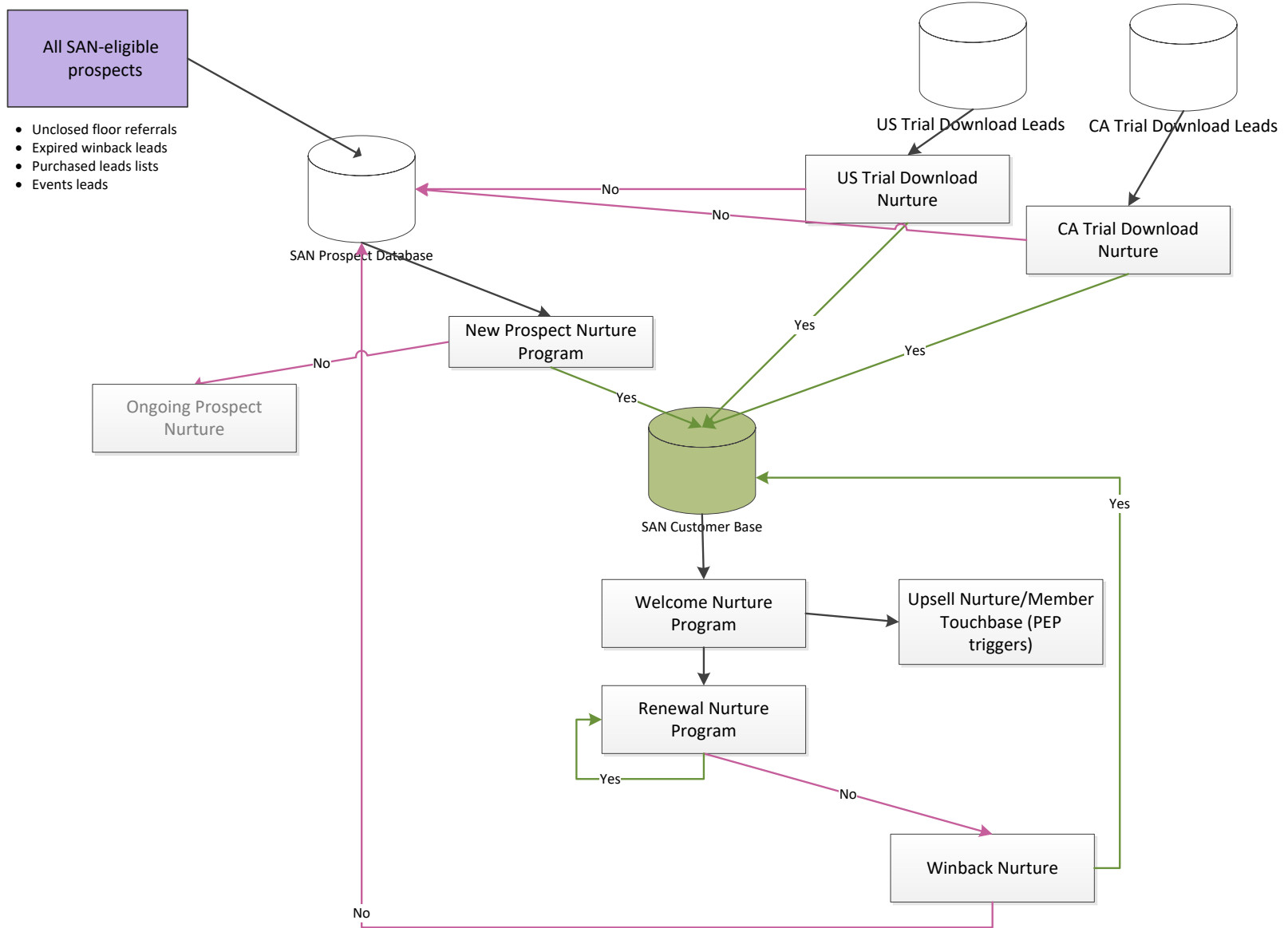# SAN Nurture Future Plans

- **2014**
  - Add triggered email and scoring capability to programs
  - Subsequent Prospect Nurture
    - Additional and more sophisticated Prospect Nurture streams will be added throughout 2014
    - Program will be grown and refined to include all acquisition activity within SAN
  - Upsell Nurture
    - Nurture stream will be developed to upsell SAN members on higher levels of SAN (future program feature), training, and certification
  - Development of segmented Nurture programs, to address specific needs of bookkeepers vs. accountants
- **2015**
  - Fully automated marketing program that covers entire SAN member lifecycle
  - New or newly discovered accountants and bookkeepers will be fed into the prospect database, which will launch them into the lifecycle stream
  - Coordinated program that includes all marketing touches to SAN members and prospects
  - Any new marketing activity to SAN members/prospects will be launched as part of Nurture program; No marketing activity will occur outside of this framework

Overall SAN Nurture Program

All SAN-eligible prospects

- Unclosed floor referrals
- Expired winback leads
- Purchased leads lists
- Events leads

US Trial Download Leads

CA Trial Download Leads

SAN Prospect Database

US Trial Download Nurture

No

CA Trial Download Nurture

No

New Prospect Nurture Program

No

Ongoing Prospect Nurture

Yes

Yes

Yes

SAN Customer Base

Welcome Nurture Program

Upsell Nurture/Member Touchbase (PEP triggers)

Renewal Nurture Program

Yes

No

Winback Nurture

Yes

No

Prospect Database

US Metrics as of 6/14/2013 (Companies normalized)				CA Metrics as of 6/14/2013	
Original List	220,000			Original List	13,000
Total Contacts	97,580			Total Contacts	9,646
Total Companies	67,732			Total Companies	5,565
Email	24,883			Email	2,742
Email or Phone	48,631			Email or Phone	5,565
Address only	18,319			Address only	-

Trial Nurture

- SAN Trial Nurture will begin with single path for Trial Download and Test Drive, and will treat Responders and Non-Responders the same – Future iterations will add split paths
- Emails will appear to come directly from the sales rep or sales manager
- All trial leads will now go to same place and receive consistent treatment
- Previously US and CAN leads, and leads from various programs, were going into separate buckets (see below)
- Campaign code will be added to form data "behind the scenes", to provide necessary identification info to sales team
- Current Trial Nurture lead sources:
  - Sage 50 US Web page
    - Prospect who indicates they are SAN-eligible (Primary Role = Outside Accountant or What is Your Industry = Accounting Services)
      - Previously included in Sage 50 Product Nurture and leads passed to SAN Sales team
  - SAN US Web page, including PPC
    - Prospects who register for Sage 50 trial through SAN US web page
      - Previously leads passed to SAN Sales team, but did not flow into any nurture stream
  - Sage 50 Canada Web page
    - Prospect who indicates they are SAN-eligible
      - Previously leads were sent to SAN Sales team to call, but did not flow into any nurture stream
  - SAN Canada Web page
    - Prospects who register for Sage 50 trial through SAN US web page
      - Previously leads passed to SAN Sales team, but did not flow into any nurture stream

SAN US Trial Nurture
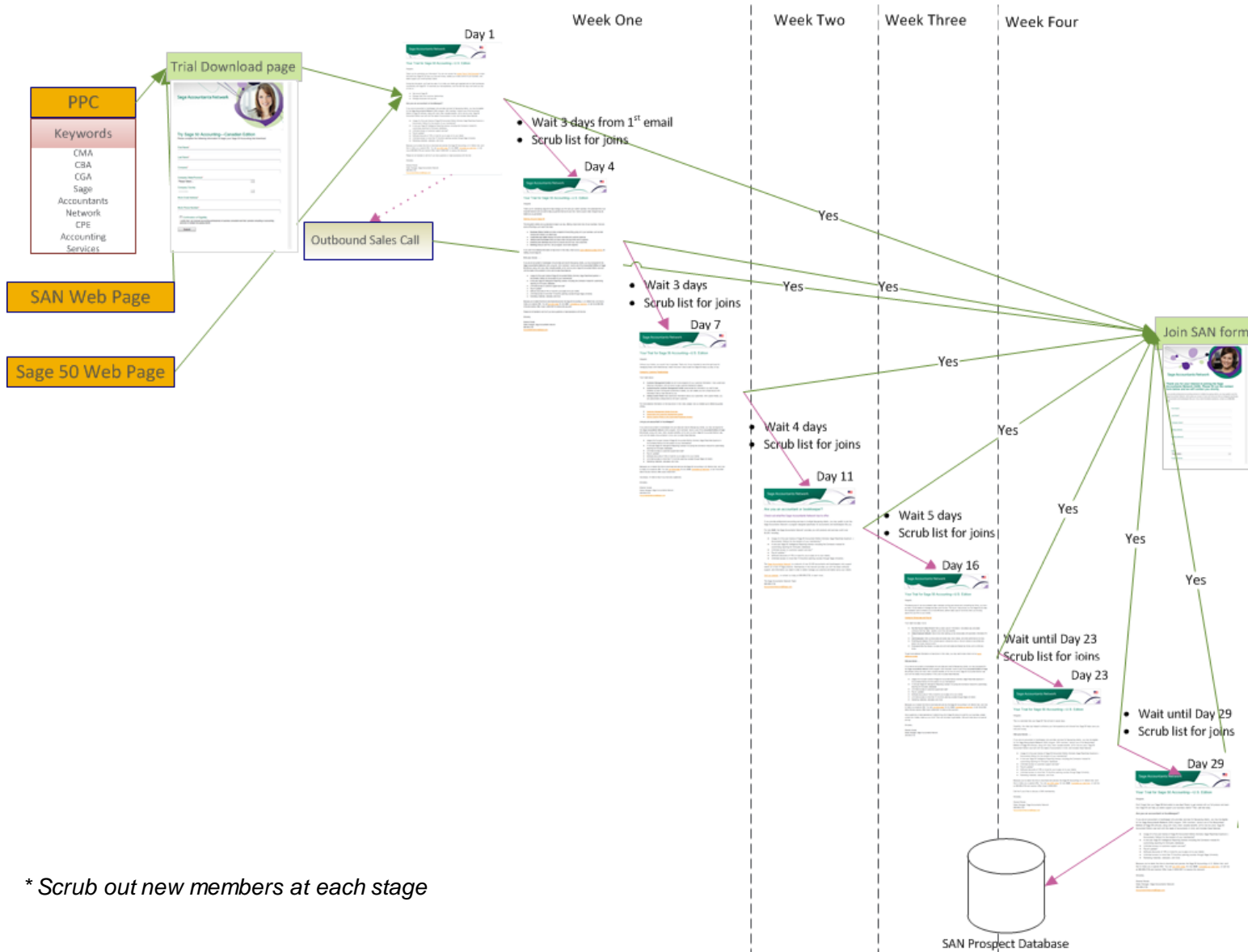
* Scrub out new members at each stage

SAN CA Trial Nurture

Week One   Week Two   Week Three   Week Four

Day 1

PPC

Keywords
- CMA
- CBA
- CGA
- Sage
- Accountants
- Network
- CPE
- Accounting
- Services

SAN Web Page

Sage 50 Web Page

Trial Download page

Outbound Sales Call

- Wait 5 days from 1st email
- Scrub list for joins

Day 6

Yes

Yes

Yes

Join SAN form

Day 11

- Wait 5 days
- Scrub list for joins

Yes

Day 16

- Wait 5 days
- Scrub list for joins

Yes

Yes

Day 23

- Wait until Day 23
- Scrub list for joins

Yes

Day 29

- Wait until Day 29
- Scrub list for joins

No

SAN Prospect Database

Scrub out new members at each stage

SAN Prospect Nurture

sage

Prospect Database:

- Will initially consist of data already owned by SAN team, with additional contact information being added as it becomes available
- Database will cover US and CAN
- Goal is to approach inclusion of every SAN-eligible firm in US and CAN
- Currently, the SAN team has approximately 110k US contacts and 10k CA contacts
  - Data has been cleaned and de-duped
  - Approximately 1/3 of records contain email address
  - We will include all records in database, with goal of filling in missing info (especially email address) as it becomes available
  - Working with new OneSource initiative, fill in data and segmentation fields

Prospect Nurture:

- Knowledge Leader position for SAN with accountants and bookkeepers
- Periodic touches with info that will help make life easier for the accountant and bookkeeper
  - Tips on running their firm
  - Compliance information
  - Any other information of interest to prospective SAN members
- Each email will provide contact information for SAN – won't actually discuss SAN membership
  - Auto-responder emails after any asset download will also contain SAN info
- All prospect nurture information provided to prospects should be just as valuable to recipient if they never join SAN

SAN US New Prospect Nurture

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Sage Accountants Network
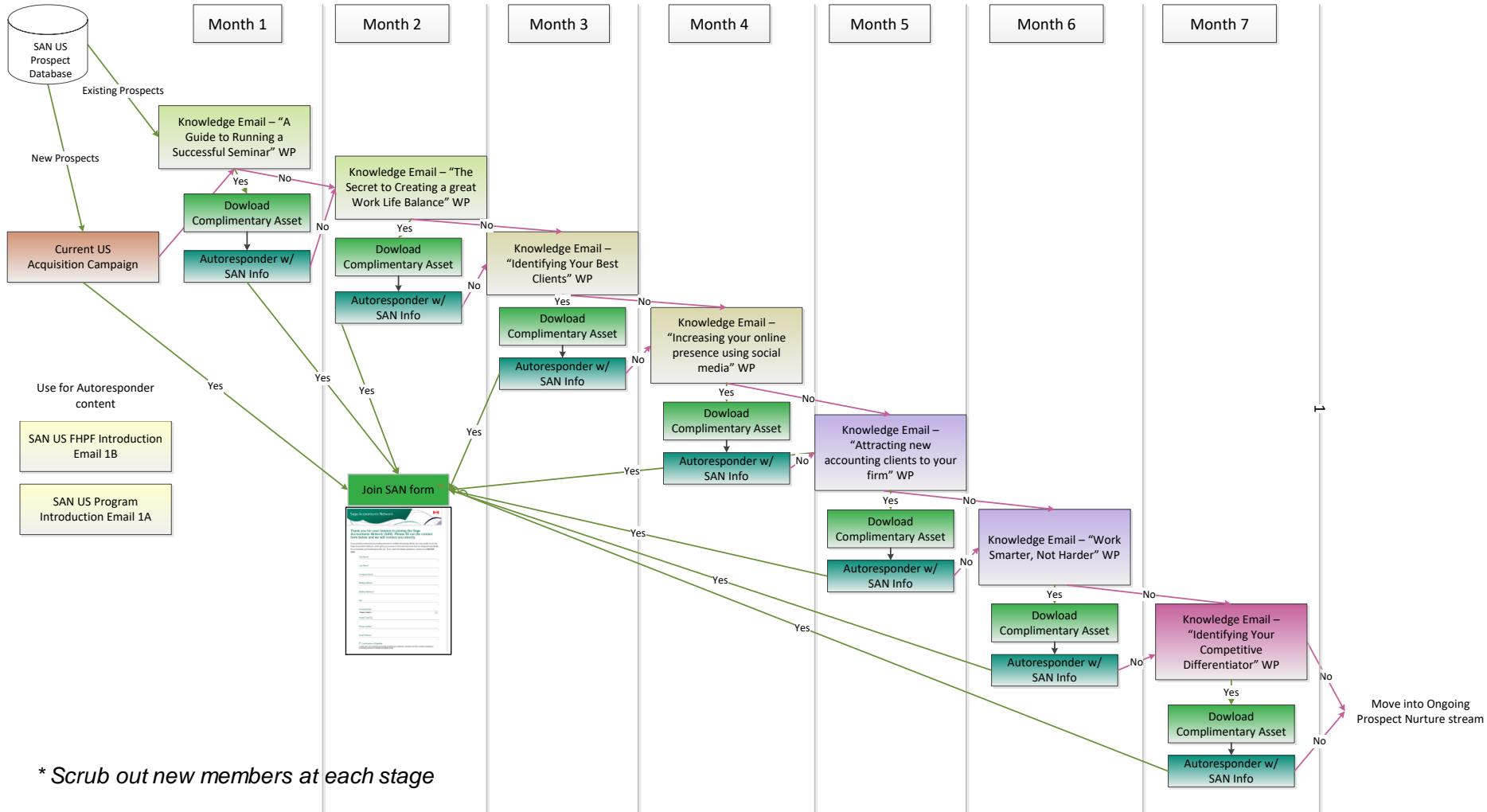
SAN CA New Prospect Nurture

Sage Accountants Network

Month 1 | Month 2 | Month 3 | Month 4 | Month 5 | Month 6 | Month 7

SAN CA Prospect Database

Existing Prospects

New Prospects

Current CA Acquisition Campaign

Knowledge Email – "A Guide to Running a Successful Seminar" WP

Dowload Complimentary Asset

Autoresponder w/ SAN Info

Knowledge Email – "The Secret to Creating a great Work Life Balance" WP

Dowload Complimentary Asset

Autoresponder w/ SAN Info

Knowledge Email – "Identifying Your Best Clients" WP

Dowload Complimentary Asset

Autoresponder w/ SAN Info

Knowledge Email – "Increasing your online presence using social media" WP

Dowload Complimentary Asset

Autoresponder w/ SAN Info

Knowledge Email – "Attracting new accounting clients to your firm" WP

Dowload Complimentary Asset

Autoresponder w/ SAN Info

Knowledge Email – "Work Smarter, Not Harder" WP

Dowload Complimentary Asset

Autoresponder w/ SAN Info

Knowledge Email – "Identifying Your Competitive Differentiator" WP

Dowload Complimentary Asset

Autoresponder w/ SAN Info

Use for Autoresponder content

SAN CA FHPF Introduction Email 1B

SAN CA Program Introduction Email 1A

Join SAN form

Move into Ongoing Prospect Nurture stream

Scrub out new members at each stage

SAN NA Outsourced New Prospect Nurture
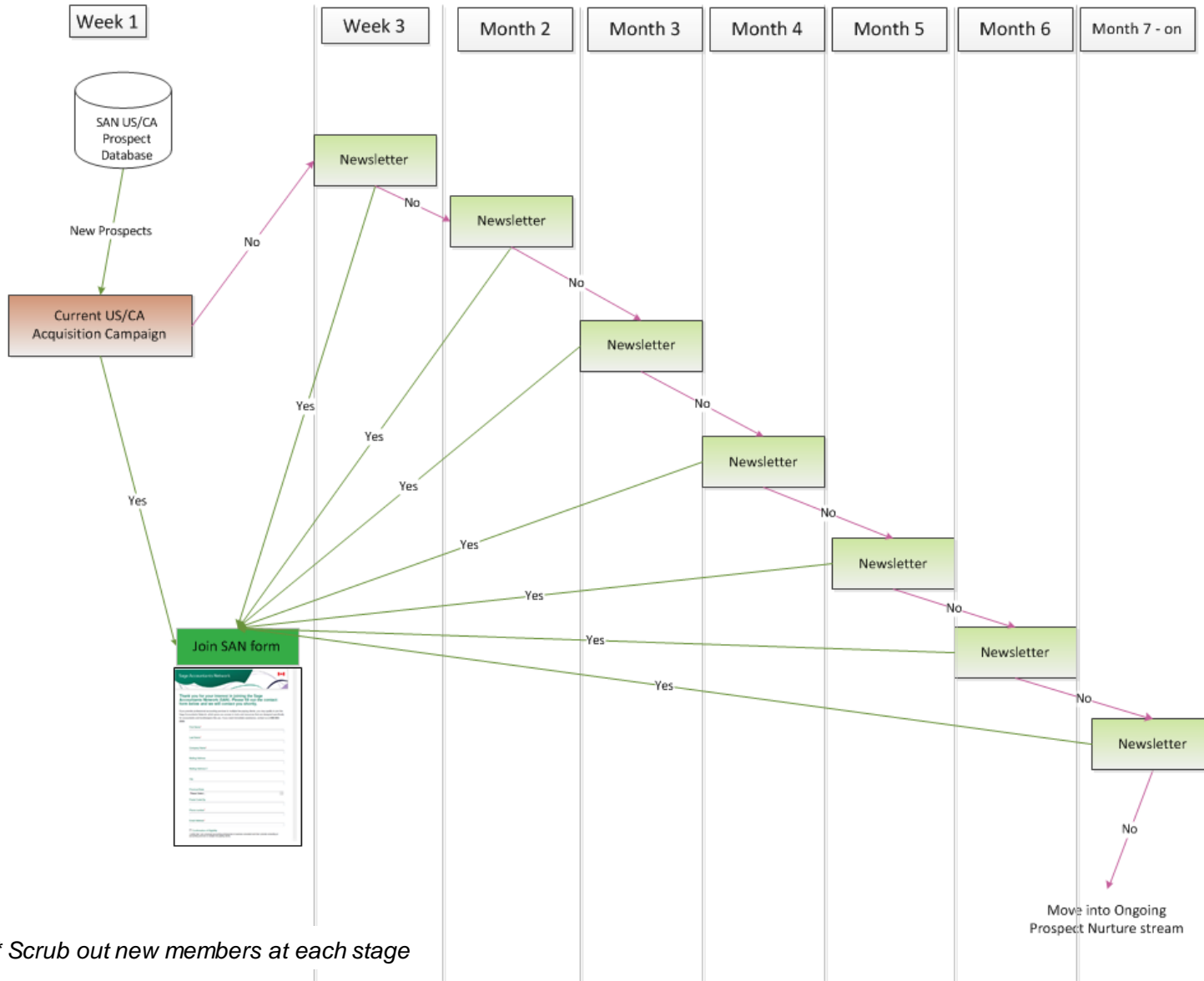
* Scrub out new members at each stage

Welcome Nurture

- U.S. Welcome Nurture – Completed 2/15/13
  - 69 U.S. SAN members have started the 9 month program
  - 30.4% unique open rate
  - 10.1% unique click-through rate
- Canadian English Welcome Nurture
- Canadian French Welcome Nurture

Previous SAN Welcome

- One email sent to new member with all information on program
- Welcome webinar held periodically in CA; Discontinued in US due to lack of resources
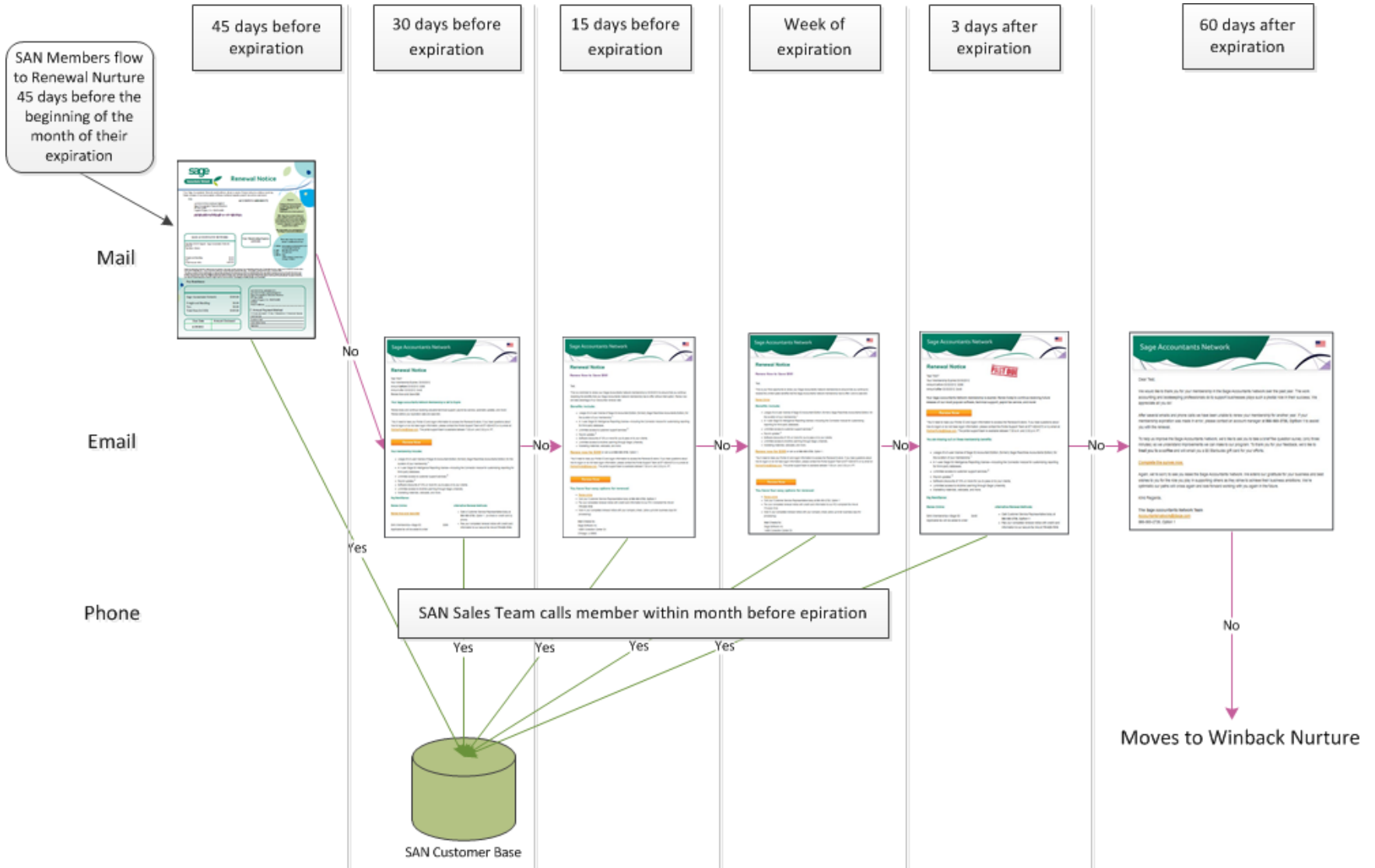

Sage Accountants Network

SAN Welcome Nurture
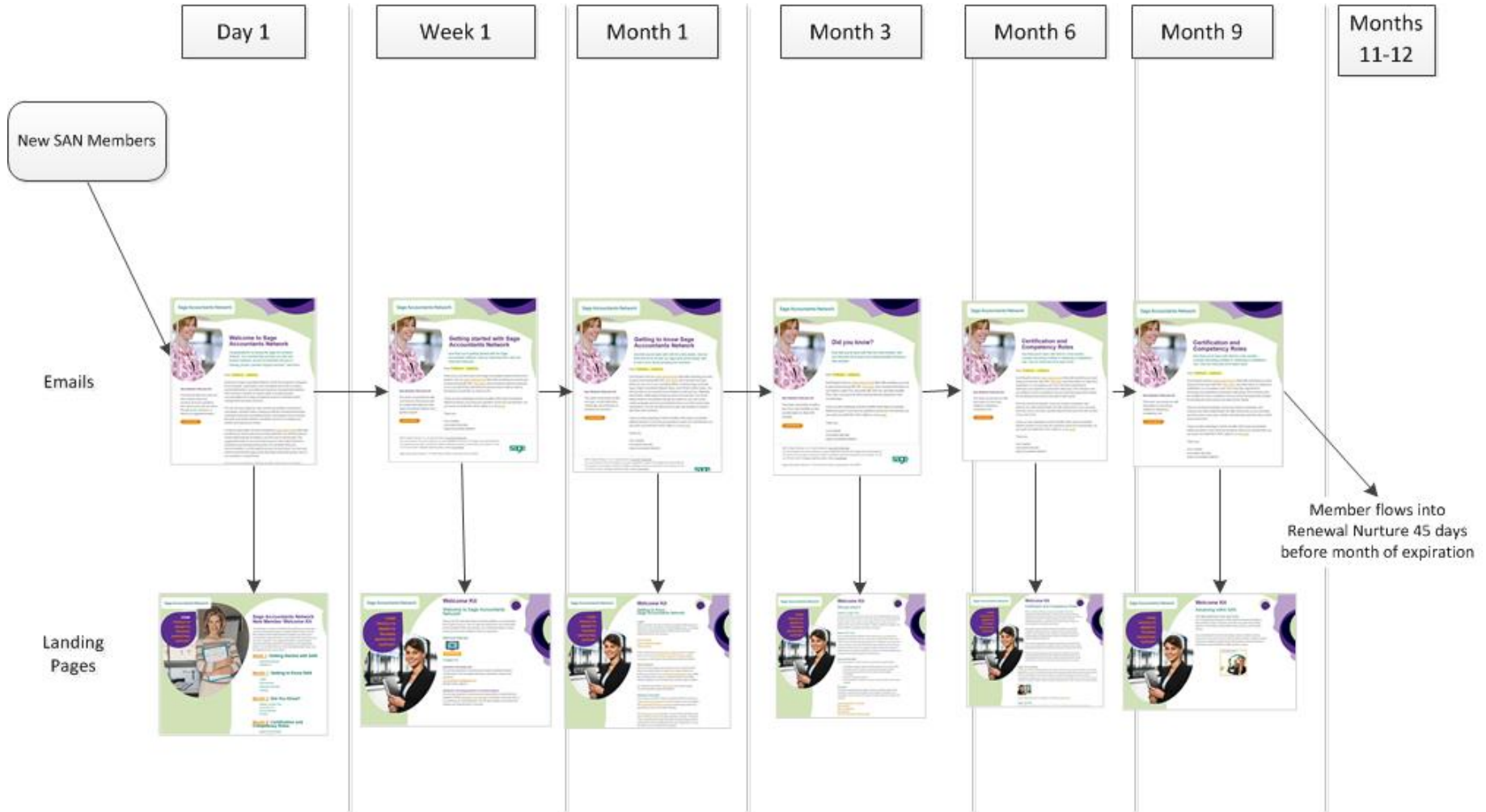
Renewal Nurture

- U.S. Renewal Nurture
- Launched 3/6/13
- Canadian English Renewal Nurture
- Launched 4/5/13
- Canadian French Renewal Nurture

Renewal Nurture

Winback Nurture

- Targeted at past SAN members who have been expired for 3 months or more

- Will focus on reminding member how valuable a SAN membership can be

- Lead is fed into stream upon 3 months after expiration, and stays in stream for 5 months

- If lead does not convert as a result of the Winback Nurture effort, will flow to Prospect database, to be nurtured further there

SAN Winback Nurture