

Drip Marketing Campaign

For PlanSource Elite Brokers

*Human Capital Management*

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# Drip Marketing Overview

Drip email marketing campaigns are a sequence of email messages sent, usually via marketing automation software to a set of contacts according to their preferences, needs or interests. To develop an effective drip campaign, you will need the following:

1. **A Good List**

You’ll need a list of contacts that at a minimum, includes their email address. But the more you know about an individual, the more effective you will be able to tailor the content to the reader. For example, if you know their first name, you can customize each email with the individual’s first name. You will also be able to “segment” the list, which means sending different messages to different groups that have different preferences.

1. **Interesting Content**

All of the content marketing rules for designing and sending effective emails apply to drip marketing – but the most important rule is to keep communications simple and engaging. Remember, the goal of the email is to get them to open the email and take whatever action you want them to take. And by keeping content educational, interesting and targeted, you can minimize the number of people who unsubscribe.

1. **Appropriate Cadence**

If you automate an email campaign where you are just touching customer routinely with no thought to the strategy and end-goal, the program is likely to underperform. Ask yourself these five questions before you plan out the cadence:

1. Who is the target audience?
2. How do they want to be communicated with (e.g., email, call, social media)?
3. What type of content do they want to see (e.g., value points, peer evidence, features, best practices)?
4. What happens when a prospect “raises their hand” or fails to respond? (e.g., who has the ball?)
5. How will the activities move prospects towards, into and out of the sales pipeline?

In terms of timing, best practices suggest that contacts should be spaced in accordance with the length of the sales cycle - the shorter the sales cycle, the shorter the time between contacts. In general, anywhere between 6 and 45 days is acceptable. 6 days between contacts avoids the risk of emailing someone twice in one week.

It is also worth thinking about how the drip campaign can use multiple methods of communication. Not all buyers have the same communication preferences and varying up the approach can help maximize results.

**4. Meaningful Measurements**

To effectively judge the performance of your drip campaign, the variables measured depend on which communication channels are being used. It is easy to get stuck in “analysis paralysis,” but here are some measurements to start with:

For emails, you should measure:

* **Delivery Rate** - The number of emails that were received out of those sent
* **Open Rate** - The number of emails opened out of those that were delivered
* **Call to Action (CTA) Rate** - The number of emails where action was taken out of those opened

For phone calls, you should measure:

* **Call Rate** - The number of calls that were made out of those possible
* **Answer Rate** - The number of phone calls answered out of those called
* **Meeting Rate** - The number of meetings scheduled out of those answered

# Drip Marketing Program Structure

To help you get started as an Elite Broker, PlanSource recommends starting simple. Starting simple will allow you to perfect the process before increasing in complexity. By starting your marketing program in pilot mode and eventually moving it to a commercial scale, you will learn what resonates and what doesn’t for your target markets. Over time, your marketing will scale to be more effective in generating demand.

PlanSource recommends starting simple with a three-email drip campaign. This means that three emails will be sent to contacts in your target market. Over time, you can integrate different channels into your drip campaign such as direct calls, social media or events, or different collateral such as videos, case studies, white papers or infographics.

Like cadence, segmentation should start simple and increase in granularity (i.e. complexity) over time as the method is perfected and performance improves. When marketing PlanSource’s benefits administration system, we recommend segmenting your target market into two categories to start:

* **Broker Customers**
* **Employer Customers**

For a drip campaign composed of three emails, PlanSource recommends using the following cadence over a 20-day period:

| **Schedule** | Broker Customers | [Employer Customers](#id.kpiph79263wb) |
| --- | --- | --- |
| Day 0 | Broker Customers - Email #1 | Employer Customers - Email #1 |
| Day 10 | Broker Customers - Email #2 | Employer Customers - Email #2 |
| Day 20 | Broker Customers - Email #3 | Employer Customers – Email #3 |

# Three-Email Drip Campaign Content

## Broker Customers

### Broker Customers - Email #1

|  |
| --- |
| **Subject** |
| Banish the “My-HR-Systems-Don’t-Integrate Blues” |
| **Body** |
| Hi <FIRST NAME>,  When your clients’ HR and benefits systems aren’t integrated, it can get you down. They, or even you in some cases, spend a lot of time doing manual updates, searching multiple databases for basic information, and you are plagued with a nagging suspicion that you don’t have a complete view of the employee.  But don’t worry! With PlanSource’s Human Capital Management (HCM) suite, your customers can have key HR systems in one place and integrated ever so nicely with your benefits administration system. As a result, you save time, resources and a lot of headaches with:   * Insight into the hire-to-retire experience in one place * Payroll and ben admin that talk to each other, so deductions are done and done right * Built-in compliance for the ACA, OSHA, DOL, COBRA and other regulations   I’d love to set up 30 minutes for us to talk about how PlanSource can help <<insert client names>> banish those unintegrated blues.  Sincerely,  <SIGNATURE>  PS - To learn more, we would love to schedule a call with you, or you can also go to: <http://plansource.com/products/hcm/> |
|  |

### Broker Customers - Email #2

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| --- |
| **Subject** |
| See How Strategic Benefits Design Unified CNRG’s HR Technology |
| **Body** |
| Hi again <FIRST NAME>,  They say that the proof is in pudding. In this case, the proof is one of the largest confederations of home improvement stores in the South Central United States.  **Disparate systems created numerous inefficiencies and noncompliance issues** When CNRG was founded in 2011, it used separate benefits administration and human resources systems, which created mountains of paper, inefficiencies and noncompliance. Their broker, Strategic Benefits Design, led a nationwide search and eventually they selected PlanSource to unify their benefits and HR technology.  **The result? One source for HR and benefits management** After implementing PlanSource’s HCM suite, the CNRG team experienced:   * **Smooth-running payroll** that seamlessly integrates with benefits systems. * **Full compliance** with all regulations including the ACA, OSHA, DOL and COBRA. * **Simplified hiring and separation** that automatically update across benefits, payroll and other systems.   Read the full case study about how this broker helped CNRG succeed: [www.plansource.com/cnrg](http://www.plansource.com/cnrg).  Sincerely,  <SIGNATURE> |
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### Broker Customers - Email #3

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| **Subject** |
| Could You Connect Me With The Right Person? |
| **Body** |
| Hi <FIRST NAME>,  Sorry we haven’t been able to connect in recent weeks regarding an opportunity to integrate your HR and benefits administration processes with a cloud-based solution from our technology partner, PlanSource.  If you are not the right person to speak to within your company, could you connect me with person responsible for HR and benefits in your company?  Sincerely,  <SIGNATURE> |
|  |

## Employer Customers

### Employer Customers - Email #1

|  |
| --- |
| **Subject** |
| Got the “My-HR-Systems-Don’t-Integrate Blues?” |
| **Body** |
| Hi <FIRST NAME>,  When your HR and benefits systems aren’t integrated, it can get you down. You spend a lot of time doing manual updates, searching multiple databases for basic information, and you are plagued with a nagging suspicion that you don’t have a complete view of the employee.  But don’t worry! With PlanSource’s Human Capital Management (HCM) suite, you can have all your key HR systems in one place and integrated ever so nicely with your benefits administration system. As a result, you save time, resources and a lot of headaches with:   * Insight into the hire-to-retire experience in one place * Payroll and ben admin that talk to each other, so deductions are done and done right * Built-in compliance for the ACA, OSHA, DOL, COBRA and other regulations   I’d love to set up 30 minutes for us to talk about how PlanSource can help you banish those unintegrated blues!  Sincerely,  <SIGNATURE>  PS - To learn more, we would love to schedule a call with you, or you can also go to: <http://plansource.com/products/hcm/> |
|  |

### Employer Customers - Email #2

|  |
| --- |
| **Subject** |
| See How CNRG Banished Paper |
| **Body** |
| Hi again <FIRST NAME>,  They say that the proof is in pudding. In this case, the proof is one of the largest confederations of home improvement stores in the South Central United States.  **Disparate systems created numerous inefficiencies and noncompliance issues** When CNRG was founded in 2011, it used separate benefits administration and human resources systems, which created mountains of paper, inefficiencies and noncompliance. After a nationwide search, they selected PlanSource to unify their benefits and HR technology.  **The result? One source for HR and benefits management** After implementing PlanSource’s HCM suite, the CNRG team experienced:   * **Smooth-running payroll** that seamlessly integrates with benefits systems. * **Full compliance** with all regulations including the ACA, OSHA, DOL and COBRA. * **Simplified hiring and separation** that automatically update across benefits, payroll and other systems.   Read the full case study at [www.plansource.com/cnrg](http://www.plansource.com/cnrg).  I’d love to set up 30 minutes for us to talk about how PlanSource can help you banish those unintegrated blues!  Sincerely,  <SIGNATURE> |
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