

Kentico Marketing Automation

Using Marketing Automation for Event Management

Marketing Automation is one of the most popular marketing techniques that allows marketers to automate repetitive processes and get rid of the tasks that, otherwise, they would have to do manually. It doesn't really matter if you are a B2B or B2C business, Marketing Automation can be a big help to both.

Marketing Automation is an amazing tool for lead nurturing, lead and campaign management, and e-commerce activities, but we should not forget about event management too! If you are responsible for managing events in your company, Marketing Automation will certainly make your life easier.

When it comes to organizing events, Marketing Automation allows you to talk to your event attendees with greater speed and customization. You'll be able to manage the whole event communication automatically, from the beginning to its end—send email invitations, segment attendees, and keep in touch with those who attended the event.

This material explains to you the basics of Kentico Marketing Automation and provides you with different scenarios to manage interactions with your event attendees **before**, **during**, and **after** the event.

The guide is divided into two sections:

1. [Setting Up Marketing Automation in Kentico](#)

This section shows you how to build Marketing Automation processes in Kentico, step by step, starting with triggers, designing your workflows up to analyzing Marketing Automation reports.

2. [Using Marketing Automation for Event Management](#)

Once you're familiar with Kentico Marketing Automation, you can start designing automated processes for your events. This section provides you with some scenarios that can serve as your inspiration when putting together your own ones.

If you're not familiar with the concept of Marketing Automation at all, we recommend that you have a look at the following materials first:

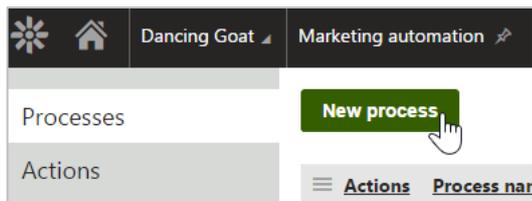
- Video: [What is Marketing Automation, and How Do I Use It?](#)
- Whitepaper: [Marketing Automation for Success](#)
- Quick Start Guide: [Marketing Automation](#)

Setting Up Marketing Automation in Kentico

You can create your automated processes in the **Marketing Automation** application. The Marketing Automation application allows you to create your processes, design workflows, define the way the processes start, run it on your contacts, and, finally, analyze the results.

Follow these simple steps to create your automated process:

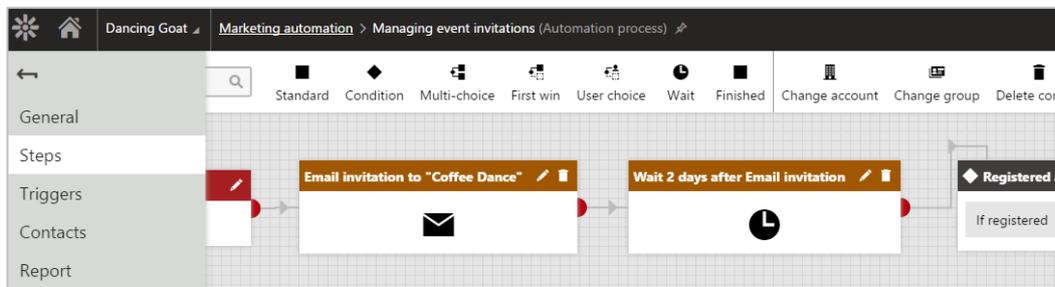
1. Create a Process



2. Design a Workflow

You can design your processes using the visual designer that can be found on the **Steps** tab. Once you access the built-in designer you may notice all the steps that are available to you in the upper part of the designer.

To design your process, simply drag those that you need for the workflow onto the grid and connect them using the transition lines. Once on the grid, you need to configure each step so they work the way you wish. You can also change their labels, set some security permissions, etc.

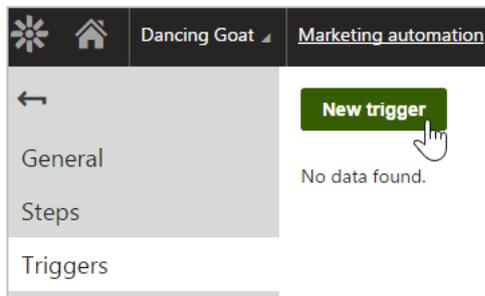


Here are a few documentation articles that can help you design your workflows:

- [Defining automatic decisions in processes](#)
- [Adding wait steps](#)
- [Adding marketing actions](#)

3. **[Set an Automatic Trigger](#)** (if necessary)

You can either start processes manually for individual contacts or have the system start processes automatically using condition-based triggers.



Every trigger has a set of conditions that determine under which circumstances the system runs the related process. For example, you can create a trigger that automatically initiates a marketing process for all contacts that submitted an event registration form on your website.

Note that each process can have multiple triggers. Contacts only need to fulfill one of the triggers to jump into the process.

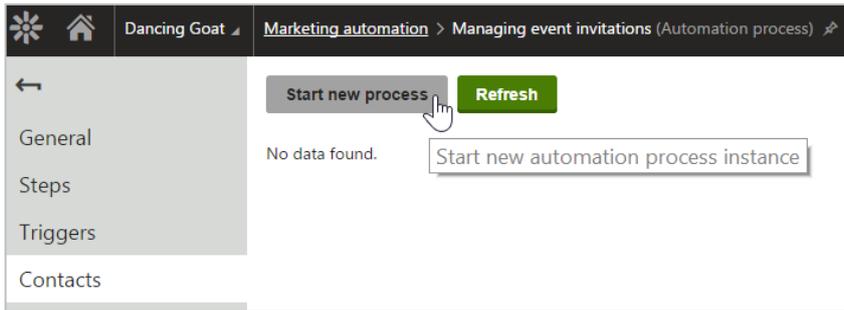
4. **[Start the Process](#)**

If you defined an automatic trigger (or multiple triggers), your process will start automatically.

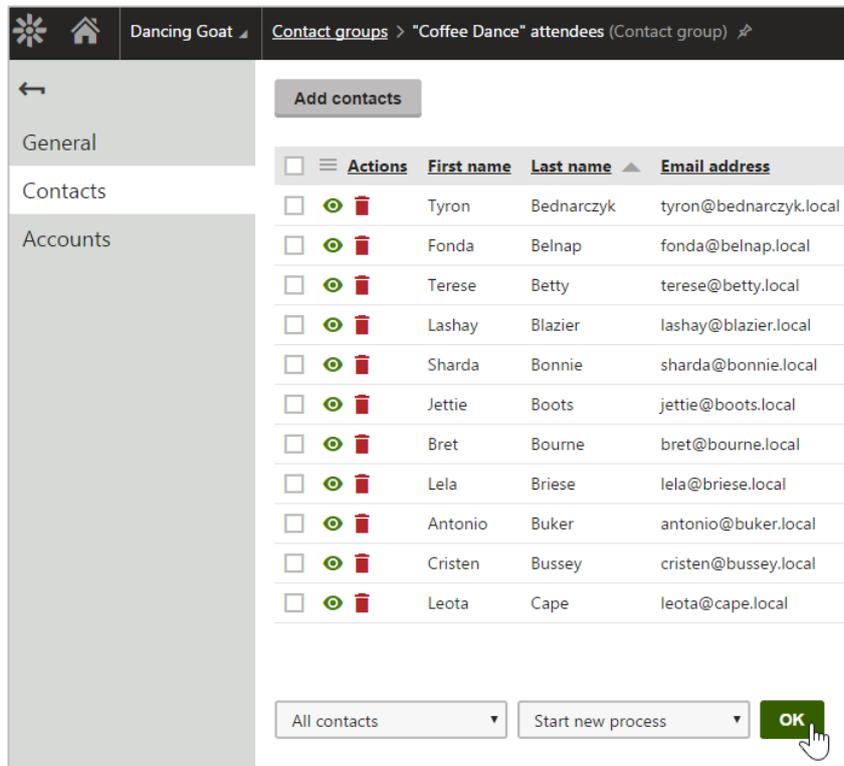
You can also start the process manually for contacts, for example, if you want to run the process only for contacts who attended your event.

When running processes manually on contacts, you have two options:

- **Run the process manually on individual contacts** – switch to the **Contacts** tab inside your automation process, click **Start new process**, and, from the list, select the contacts.



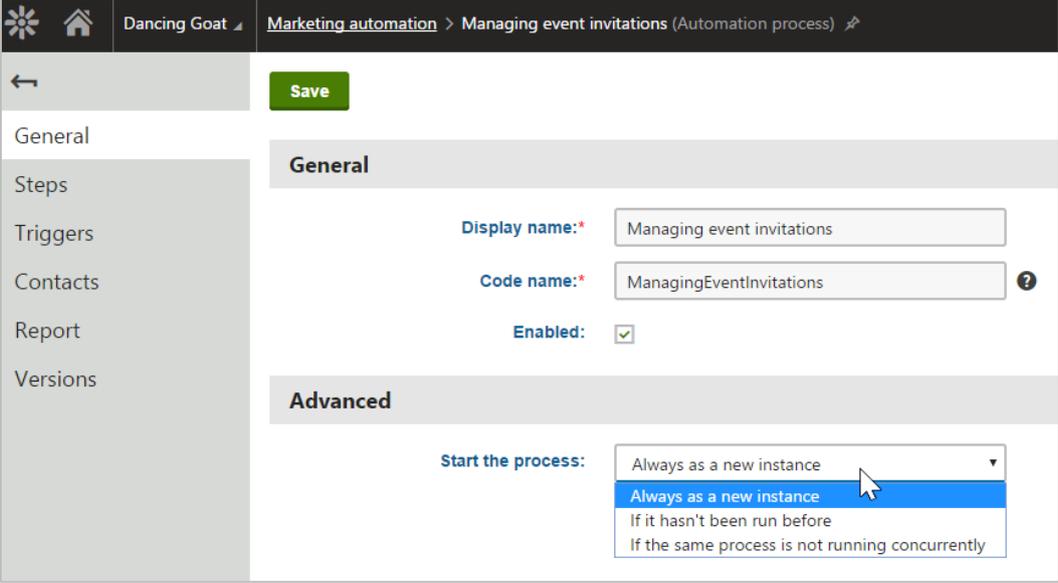
- **Run the process manually on all contacts in a contact group** – open the **Contact groups** application, switch to the **Contacts** tab, select **All contacts** and **Start new process** in the drop-down menu below the list of contacts. The last step is to select what marketing automation process should start for the contacts.



No matter whether you run your processes manually or automatically by creating triggers, you should set the process recurrence. Process recurrence determines when the process is allowed to run for each contact.

You can set the recurrence for your process on the **General** tab for the **Start the new process** drop-down menu. You have three options here:

- **Always as a new instance** - the system can create and start new instances of the process at any time for the same contact
- **If it hasn't been run before** - the process can only run once for a given contact (i.e., starts only if it has never been run for the contact before)
- **If the same process is not running concurrently** - the process starts only if there is no instance of the same process running for the contact at the same time



The screenshot shows the 'Managing event invitations' process configuration page in the Kentico Marketing Automation application. The page is divided into a left sidebar and a main content area. The sidebar contains navigation links for 'General', 'Steps', 'Triggers', 'Contacts', 'Report', and 'Versions'. The main content area is titled 'General' and contains the following fields:

- Display name:** Managing event invitations
- Code name:** ManagingEventInvitations
- Enabled:**

Below the 'General' section is the 'Advanced' section, which contains a dropdown menu for 'Start the process:'. The dropdown menu is open, showing three options: 'Always as a new instance', 'Always as a new instance', and 'If it hasn't been run before'. The first option is selected.

You can change the recurrence settings of a process at any time by editing the process in the Marketing Automation application.

Using Marketing Automation for Event Management

Not only can Marketing Automation be useful for e-commerce or lead nurturing processes, it can be useful for event management too!

On the following pages, you will learn how Marketing Automation can help you when it comes to sending email invitations, segmenting attendees, and keeping in touch with the attendees during and after the event.

We will focus on scenarios happening chronologically before, during, and after the event:

- 1. Before the Event:**
 - [Managing event invitations](#)
 - [Reaching out to registered participants](#)
- 2. During the Event**
 - [Keeping the attendees excited and informed](#)
- 3. After the Event**
 - [Keeping in touch with event attendees](#)

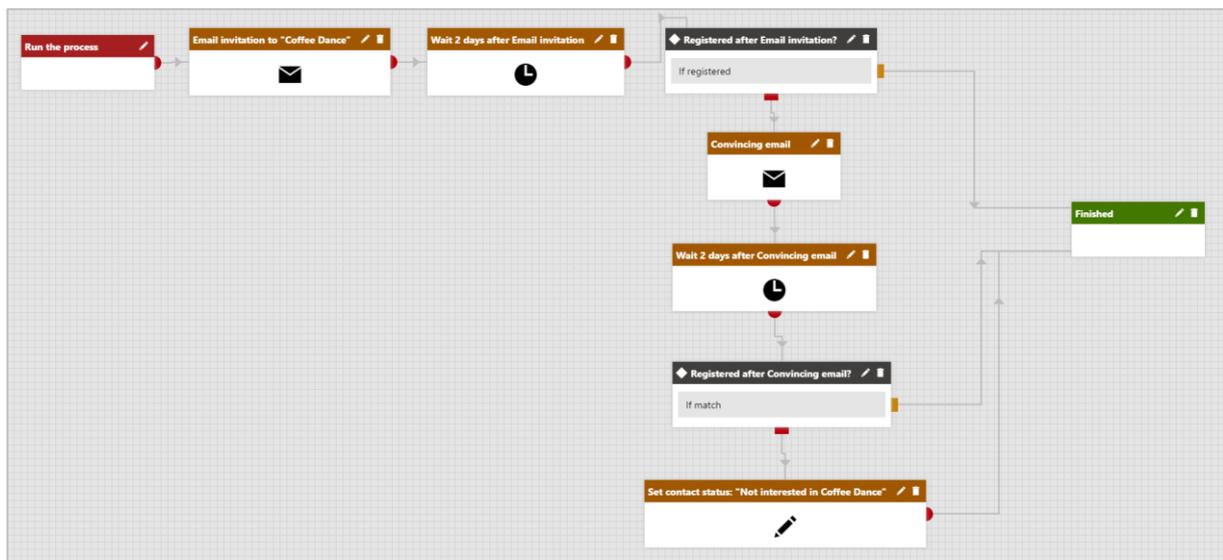
Before the Event: Managing Event Invitations

Note: The following scenarios assume that the event registration happens through a registration form placed somewhere on your website, typically a separate landing page created specifically for the event.

Probably not many people would show up for your event if you did not send out invitations, right? But how do you make sure that these invitations will turn into registrations?

The following process allows you to send an event email invitation to a group of people you want to target with your event, in our case a conference about coffee. Note that conditional steps play a very important role in the process as they split the process into branches based on whether the person in the process registered for the event or not. The process allows you to re-target the people who have not made up their minds about the event and have not registered yet.

GOAL OF THE PROCESS: Make people register for the event.

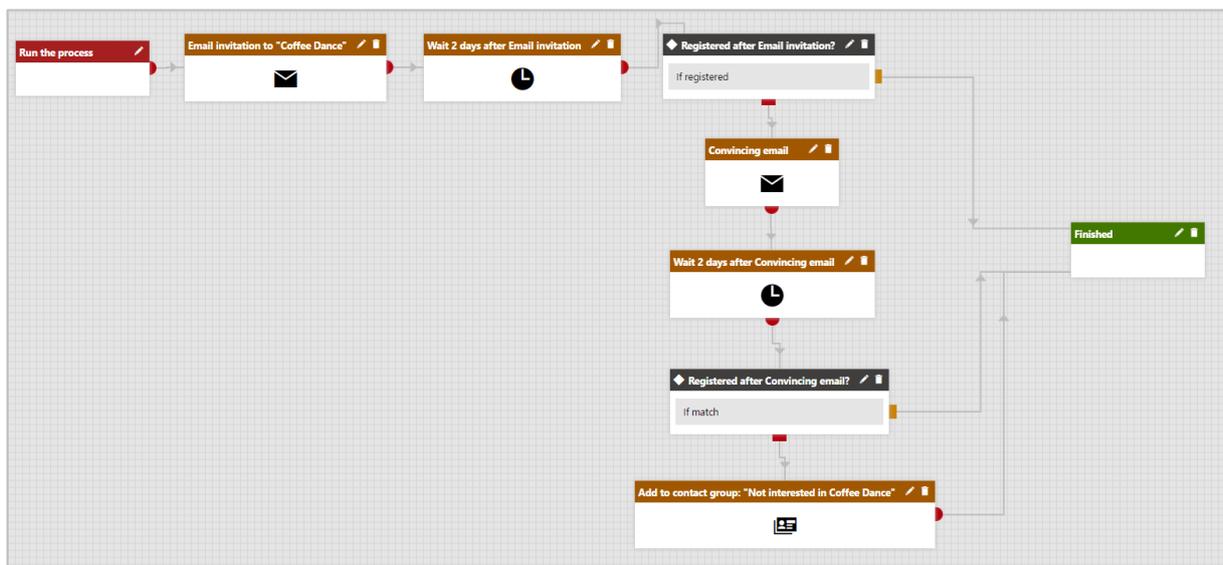


MODIFICATION 1: Send more emails

You can extend and/or change the process depending on what your scenario is. For example, you might want to send more emails convincing people why they should attend the event.

MODIFICATION 2: Replace the status step

You might also want to change the last step and instead of labeling the person with a status, "Not interested", you may replace it with a step that will add the person to a specific contact group so you have all people not attending your event in one place (use "Change group" step).



TIP: Make sure that labels for each step are all unique, so it is easier for you to say, based on marketing automation reports, who, of the contacts, finished in what step. For example, if you have two Wait steps in the process, name them differently, as you can see in the process above.

Before the Event: Reaching out to Registered Participants

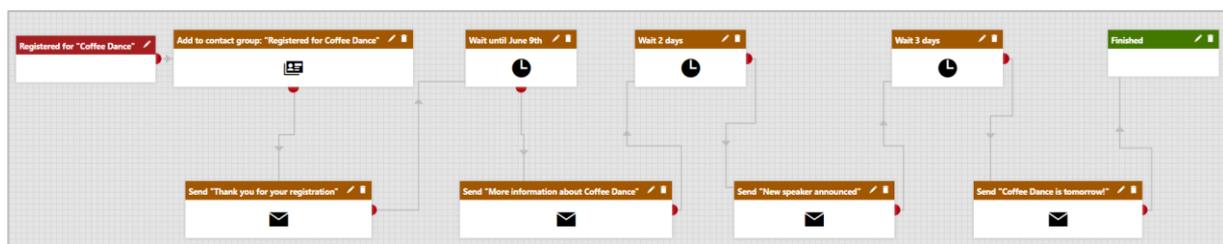
Note: The following scenarios assume that the event registration happens through a registration form placed somewhere on your website, typically a separate landing page created specifically for the event.

Great news... you have people registering for your event. But, naturally, your job does not finish here. Setting up an automated process helps you to make sure that those who filled out the registration form (and potentially paid) will really appear at your event.

The following workflow process starts for a contact, automatically, whenever he/she submits the registration page on the event landing page. What you might notice is that the system puts all registered participants into one contact group. It is because we want to have them all in one place so we can potentially export their contact details or use them in other marketing activities.

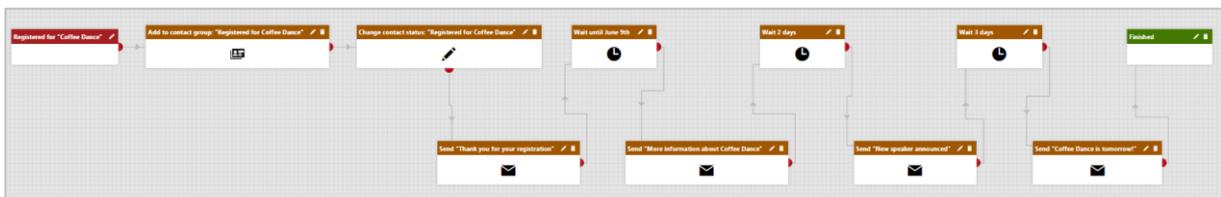
In this particular scenario, we work with the idea that the event happens on **June 15** and the registrations will close a couple of days prior to the event. Therefore, you may notice that after the registration, the process only sends one email, "Thank you for your registration". The process then waits until a specific date comes to start sending out informational emails about how great the event is going to be and providing more information on the venue and speakers.

GOAL OF THE PROCESS: Make sure that people who registered will appear at the event.



MODIFICATION 1: Change the contact's status/group after registration

Remember! Some people may need more time to make up their minds about attending the event. It may happen that you labeled them as "Not interested", or put them in a contact group for 'not registered' participants, but they changed their mind a couple of days later and registered for the event. In that case, you need to make sure that those people are correctly labeled, placed in a correct contact group or removed from the incorrect one if they registered for the event at the end.



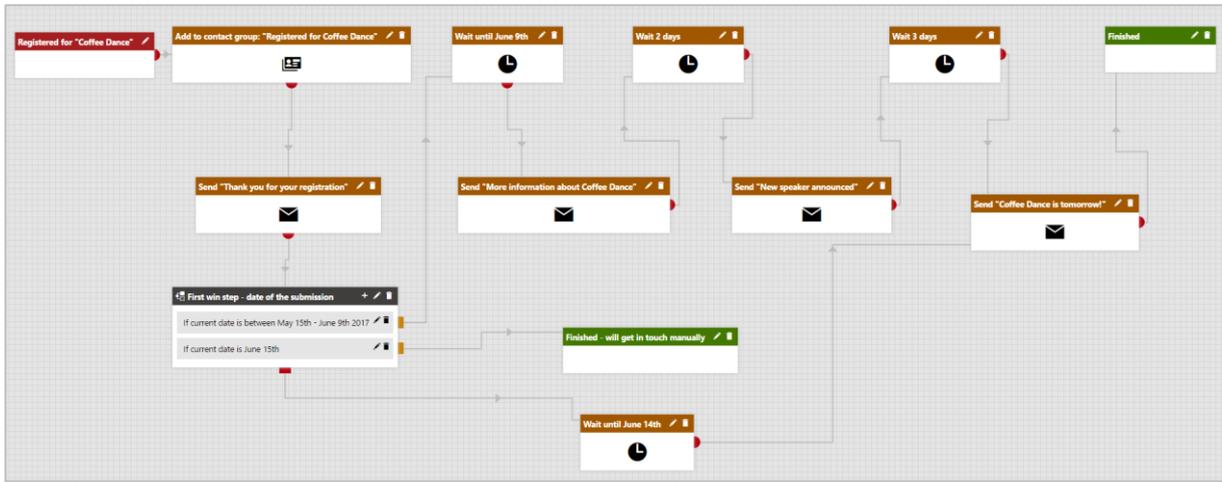
MODIFICATION 2: Close the registrations later

To make sure that you've got as many registered attendees as possible, you might want to close the registrations only on the day of the conference (June 15).

In that case, we recommend adding one extra conditional step, **First win**, which would split the process based on the date when people submitted the registration form. The First win step, reviews conditions from the top—the first condition that is met wins and the process continues in its branch. If none of the designed conditions are met, then the process moves the contact to the step connected with the red source point.

There are three possible branches when it comes to our scenario:

- Those who registered before June 9 will go through the process as you are familiar with it from the previous scenario
- People who registered between June 9 and June 14 will receive only an email, "Coffee Dance is tomorrow", as we want to make sure they only receive one email summarizing all the info they need
- People registering on the day of the conference, June 15, will not receive any email and the Event Manager will get in touch with them manually



TIP: It may be more comfortable for you to place email steps in one row and all others of a different nature (Wait steps, conditional steps...) ABOVE or BELOW them. This way, it will be very clear for you to see the number of emails you actually send to the participants.

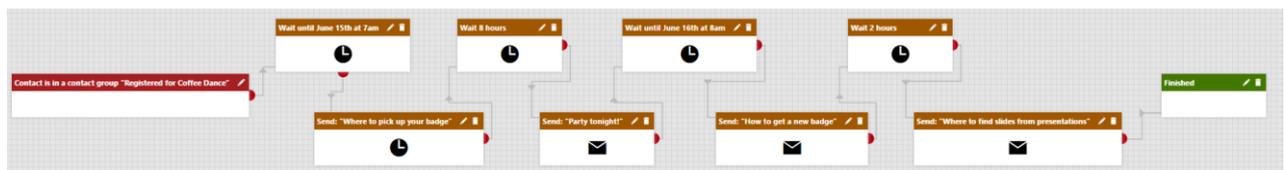
During the Event: Keeping the Attendees Excited and Informed

In case you organize an event spanning multiple days, you'll probably want to keep in touch with registered attendees during the whole event too. This can be very useful in case there is a lot of information that the attendees need to capture.

Sending a bunch of emails that help people navigate through the event can only help them stay focused and enjoy the event to its full extent. People will not have to search their inboxes in order to find information you sent them days before the event.

The topics you may want to cover in your emails are:

- **Where to pick up your badge** – if it is a big venue you don't want people to get lost right at the beginning of the event
- **How to get to the party tonight** – you want to remind people of a party you organize and make them come so they can share some feedback with you and have a lot of fun
- **Answer frequently asked questions** – there may be questions that you can expect people to have during the event, such as *"Where can I find the slides from presentations?"*, *"Will there be video recordings from the sessions?"*, or *"How can I get a new badge if I lost it?"*. Plenty of attendees may have the same questions so it is a good thing to address them as soon as possible
- **How to buy a ticket for the next year** – if you opened the registration for the next year's event it is a good idea to inform people about it while still at the event. Their positive emotions about the event can help them make an immediate decision and buy a ticket for the next year too.
- **Attendee survey** – just before the event comes to its end, you can ask the event attendees to fill out a survey answering a few questions about the event they just attended. It can give you valuable information on how people felt about the event and what changes you should make for the next year's edition.

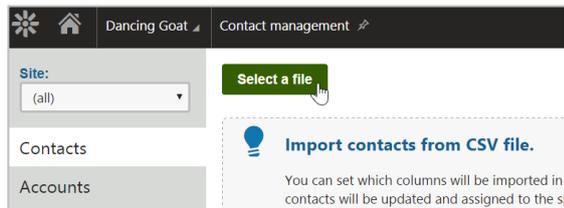


After the Event: Keeping in Touch with Event Attendees

Alright, so your event has been a great success and everything went the way it should. What you probably want to do now is follow up with the event attendees. Here's how you can do it, step by step:

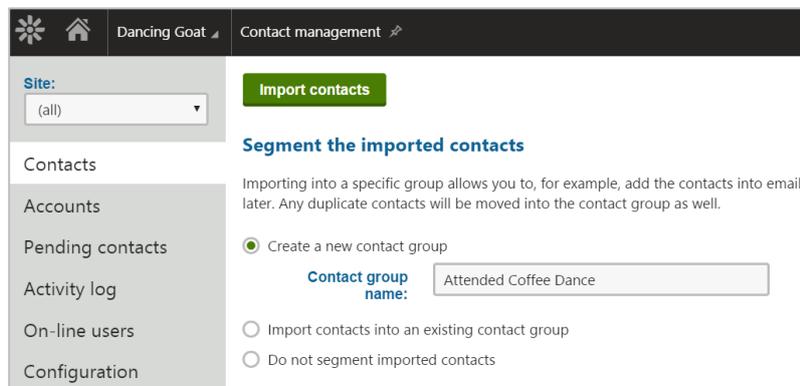
1. Import Contacts

First, you need to jump into the Contact Management application and [import people](#) who really attended the event.



These will probably be your existing clients but also new prospects, depending on the type of the event. Don't worry, Kentico EMS will make sure that no duplicates are created, which means that in case you import contacts that already existed in the system, their contact details will only be updated with the information you got about the contact during the event (e.g. Company name, Telephone number, or Job title).

It is also recommended that you select the **Create a new contact group** option to create a contact group out of those imported contacts. This way you will have them all in one place and you can easily run your following marketing automated processes on them.



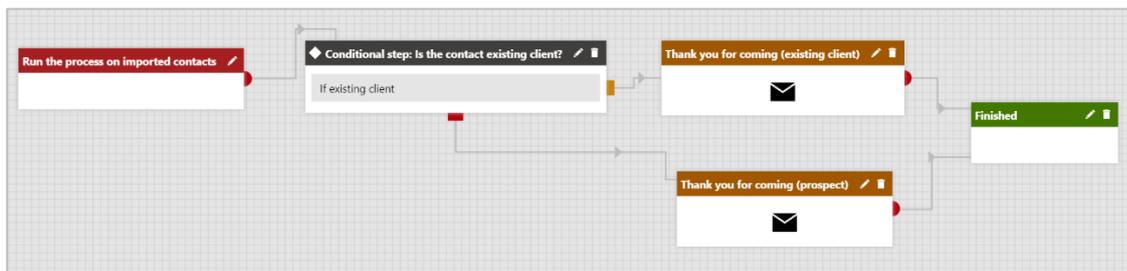
2. Run the Automated Process

Next, you want these attendees to jump into an automated process that you designed. In the first section of this guide, we already described how to [run your processes manually](#) on your contacts.

The type of process you design highly depends on what you want to achieve after the event. Maybe you just want to say thanks for coming, maybe you want to educate them further on a specific topic, or convince them to take some action on your website. Here are some examples we already designed for you:

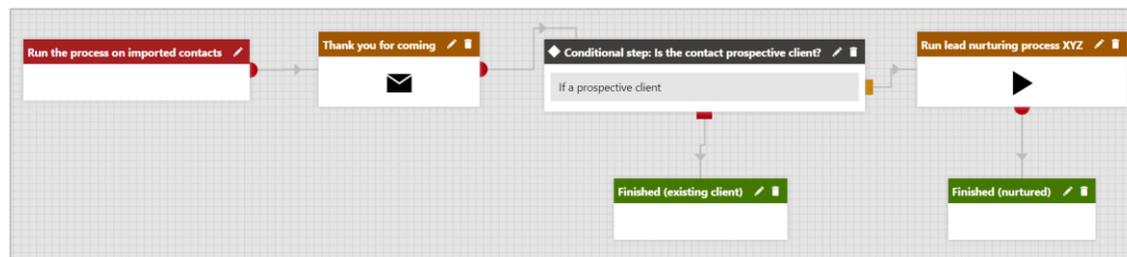
Thank You for Coming Process

You might create a simple process thanking people for attending your event. If you wish, you may create two different emails for existing and potential clients, as it is expected that you will use a different wording when talking to the prospects.



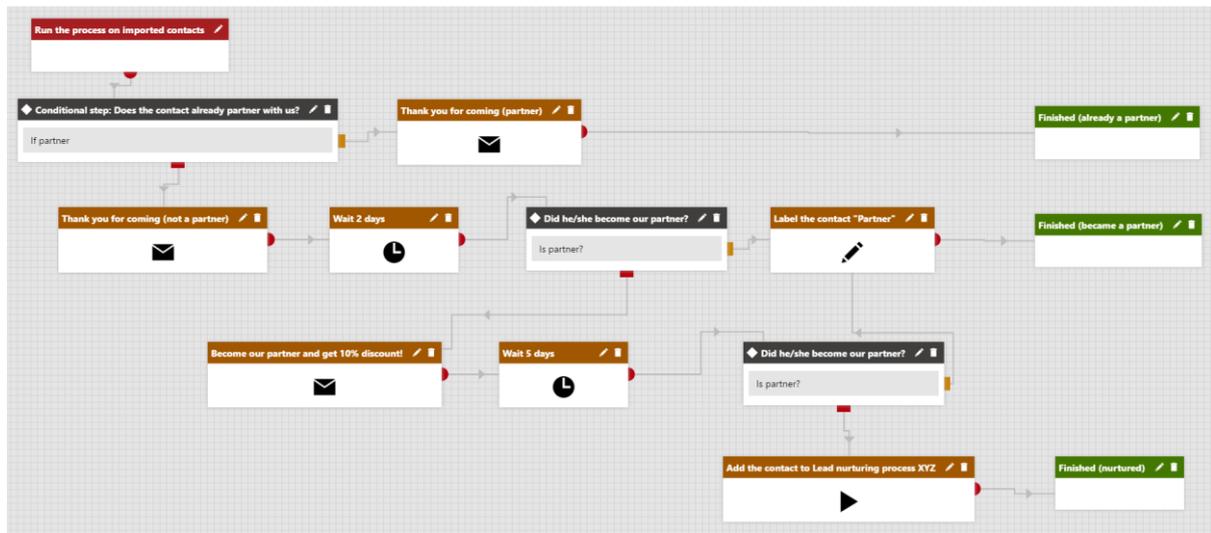
Lead Nurturing Process

As you can see, the process below sends a 'Thank you for coming' message to everyone, no matter whether they are existing or prospective clients. The process then continues only for prospective clients. These will be moved to another automated process with a goal of educating the leads on a particular topic and making them feel like they need your services or products. In the best scenario, the lead nurturing process should finish with a conversion - e.g., a purchase, registration, booking etc.



Take an Action Process

The goal of the following process is to make the event attendees take an immediate action on our website. In our scenario, we want people to start a partnership with our company. In your scenario, it can be a purchase, an online registration, or a donation.



TIP: Have the follow-up process/es (and all the emails) ready, even before the event starts, as you want to follow-up with the attendees as soon as the event is over.