

Inbound Marketing on the Finalsite Platform

Lauren Barth, Chief Product Officer



#FinalsiteU | @FinalsiteK



Lauren Barth
Chief Product Officer

2009 - 2011 | Development Team
Integration Specialist

2011-2015 | Product Team
Product Manager

2015 - 2016 | Product Team
Director of Product

2016 - Present | Product Team
Chief Product Officer

Inbound Marketing on the Finalsite Platform

Session Agenda

Why build inbound marketing tools?

Understanding the funnel and Finalsite's tools

The background features a blue-tinted image of a smartphone and a calendar. The smartphone screen displays the text 'INBOUND MARKETING STRATEGY' at the top, followed by several circular icons representing different marketing metrics: 'VISITORS', 'CUSTOMERS', and 'PROMOTERS'. Below the icons is a silhouette of a group of people. The calendar in the background shows dates for the year 2016, with a red pen resting on it.

Why does Finalsite want to build inbound marketing tools?

Why build inbound marketing tools?

- Opportunity to increase efficiency, save time by tying together some of the loose ends
- More powerful tools will increase our schools' abilities to be successful with their inbound strategies

Challenges with external tools

- Overwhelming, difficult to use, expensive
- Designed for businesses, not schools
- Disconnected experience for admins
- Disconnected analytics

Understanding the funnel

**Inbound marketing is all about getting
the right content in front of the right
person at the right time**

Let's review the funnel

ATTRACT

Brand awareness and earning traffic to your website

RECRUIT

Conversions such as viewbook downloads or enquiry form submissions

NURTURE

Continuous engagement during the decision-making process

RETAIN

Maintain engagement to keep enrolled students

The tools associated with each step

ATTRACT

Keywords/SEO
PPC
Social media ads
Blogs (Posts)

RECRUIT

CTAs (Page Pops,
pages, emails)
Landing pages
with Forms and
thank you pages

NURTURE

Automated email
campaigns
(Workflows)
Segmented lists &
personalised
emails (Messages)

RETAIN

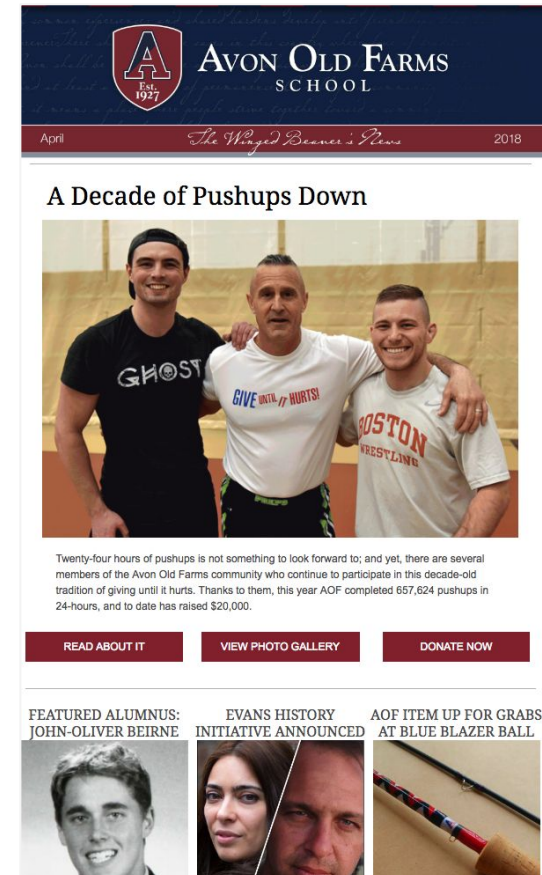
Personalised
emails
Relevant content
Portals
Social media

Taking a Prospect from Enquiry to Application

- The goal is to attract the right users, and hold their attention
- Recruit them into your contact database
- Nurture users and entice them to engage with your content via social media, blogs and email to push them to enquire
- Continue to nurture to convert enquiries to applications

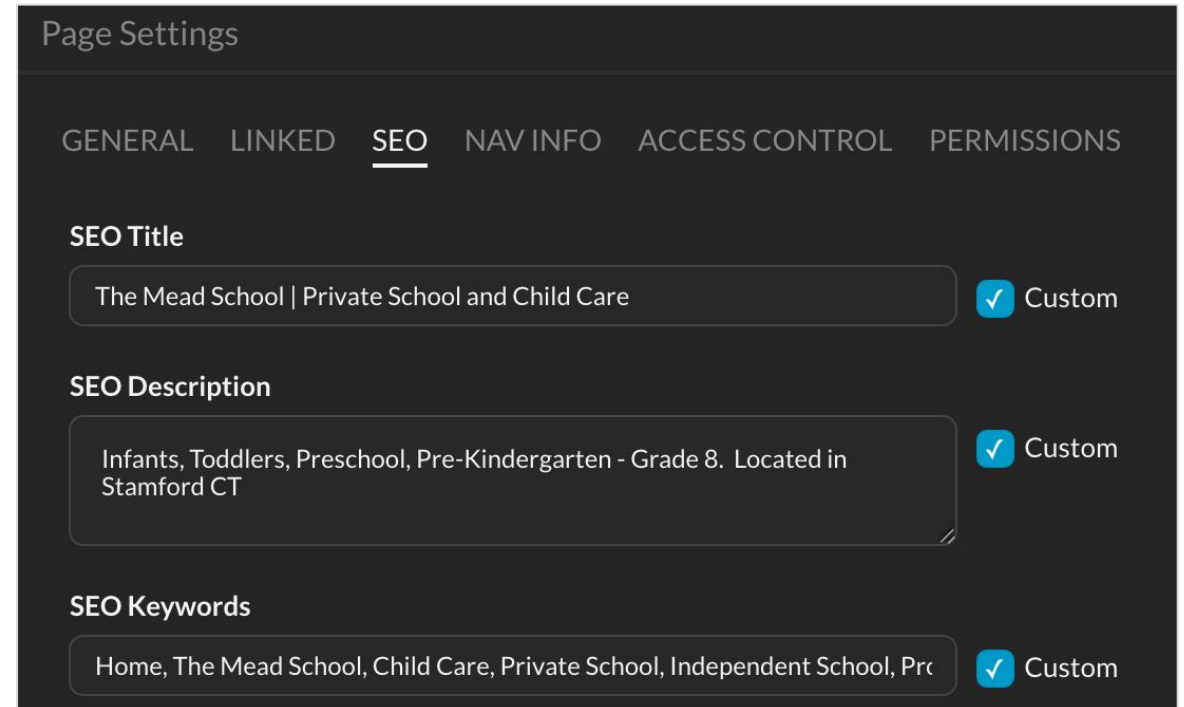
Use social media to get content in front of users

- Social media posts
- Social media ads



Basic SEO Tips

- Log into your SEO settings right now, and if they look like this, add it to your to-do list
- Short on time? Add an SEO Title and Description to your top hit pages
- So important for getting prospective families to land on your site



The screenshot shows the 'Page Settings' interface with the 'SEO' tab selected. It displays three fields: 'SEO Title' with the value 'The Mead School | Private School and Child Care', 'SEO Description' with the value 'Infants, Toddlers, Preschool, Pre-Kindergarten - Grade 8. Located in Stamford CT', and 'SEO Keywords' with the value 'Home, The Mead School, Child Care, Private School, Independent School, Prc'. Each field has a 'Custom' toggle switch that is turned on.

Page Settings

GENERAL LINKED SEO NAV INFO ACCESS CONTROL PERMISSIONS

SEO Title

The Mead School | Private School and Child Care Custom

SEO Description

Infants, Toddlers, Preschool, Pre-Kindergarten - Grade 8. Located in Stamford CT Custom

SEO Keywords

Home, The Mead School, Child Care, Private School, Independent School, Prc Custom

Blogs with the Posts module

- Boost SEO with blogs
- Pick 1-2 keywords and use them in your title, body, URL and meta description
- Have a mobile-friendly blog page
- Have logical (and not too long) URL path to your blog
- Use alt-text on images



Student Blogs

Stevenson students volunteer to share their experience monthly through photos, blog posts, and videos. Take a moment to learn more about boarding and day life at Stevenson through the eyes of a student. We encourage you to introduce yourself to our bloggers via email and ask the questions that are on your mind.



Amellalli



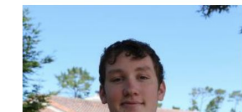
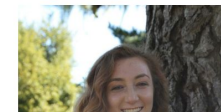
Catherine



Joseph

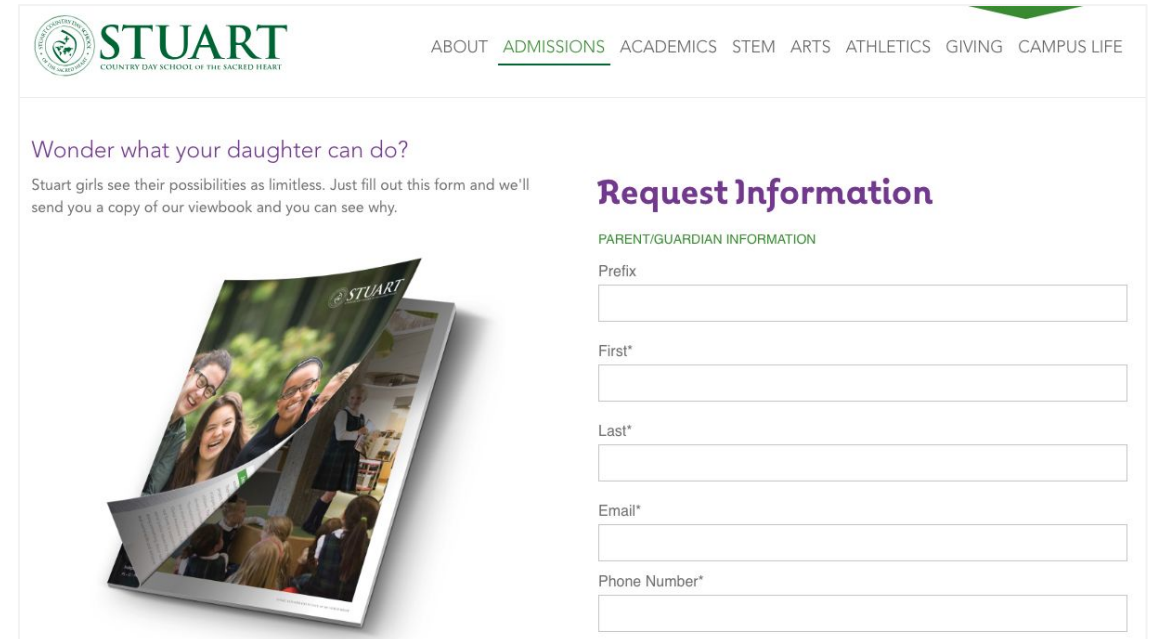


Matt



Landing pages

- Simple two-column layout, and remove any distractions, including navigation
- Use a clearly defined value proposition
- Keep the form short; 3-5 fields
- Use an action word in the button
- Use images and videos
- Don't forget to say, "thank you"



STUART
COUNTRY DAY SCHOOL OF THE SACRED HEART

ABOUT ADMISSIONS ACADEMICS STEM ARTS ATHLETICS GIVING CAMPUS LIFE

Wonder what your daughter can do?
Stuart girls see their possibilities as limitless. Just fill out this form and we'll send you a copy of our viewbook and you can see why.

Request Information

PARENT/GUARDIAN INFORMATION

Prefix

First*

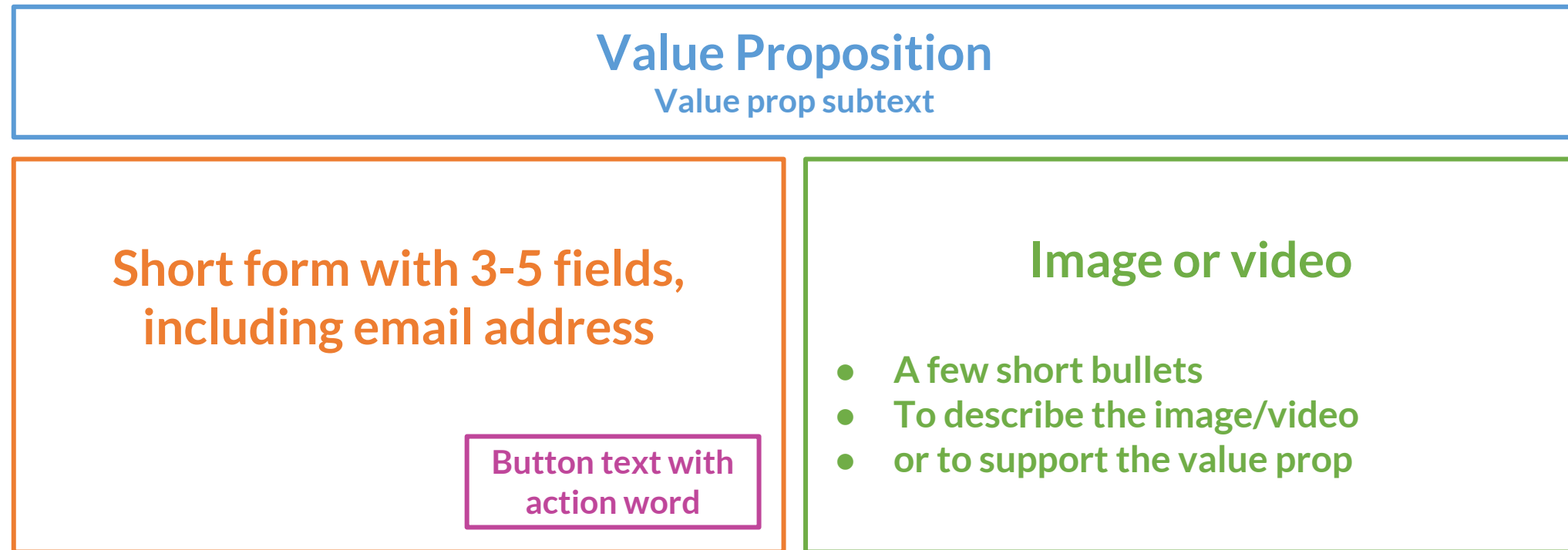
Last*

Email*

Phone Number*

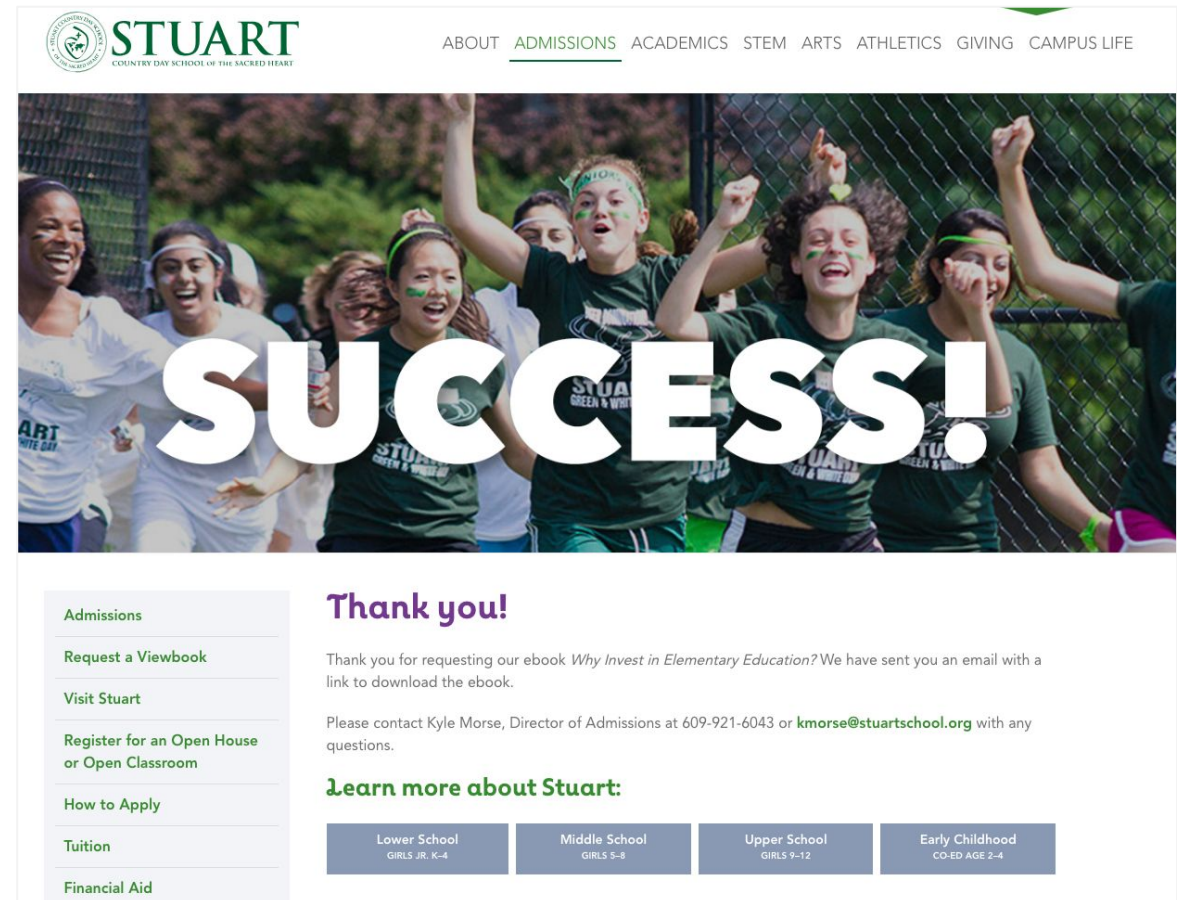
Landing Page Layout

Simple layout with no navigation, and the form on the left (so it stacks near the top on a mobile device).



“Thank You” Page Best Practices

- The content they were promised (if any)
- Additional content to engage with — such as a video, blog or news library
- Social media mash-up
- “Next steps”



STUART
COUNTRY DAY SCHOOL OF THE SACRED HEART

ABOUT ADMISSIONS ACADEMICS STEM ARTS ATHLETICS GIVING CAMPUS LIFE

SUCCESS!

Admissions

- Request a Viewbook
- Visit Stuart
- Register for an Open House or Open Classroom
- How to Apply
- Tuition
- Financial Aid

Thank you!

Thank you for requesting our ebook *Why Invest in Elementary Education?* We have sent you an email with a link to download the ebook.

Please contact Kyle Morse, Director of Admissions at 609-921-6043 or kmorse@stuartschool.org with any questions.

Learn more about Stuart:

- Lower School
GIRLS JR. K-4
- Middle School
GIRLS 5-8
- Upper School
GIRLS 9-12
- Early Childhood
CO-ED AGE 2-4

Page Pops

Drive conversions with the Page Pops module

- Limit to select pages
- Include a call-to-action
- Great for promoting open houses, upcoming events, or a piece of content

The screenshot displays the Page Pops configuration interface. At the top, the message title is "Create Your Path at Woodward Academy". The message content includes details for two open houses: "Attend Woodward's Open House!" (Main Campus - Pre-K to 12, Sunday, October 22, 2 to 5 p.m., 1662 Rugby Avenue, College Park, GA 30337) and "Attend Woodward North's Open House!" (Woodward North - Pre-K to 6, Sunday, November 12, 2 to 4 p.m., 6565 Boles Road, Johns Creek, GA 30097, RSVP by November 9). The interface also shows a rich text editor toolbar and a "Message" section.

On the right side, there are fields for "Created By" (Amy Morris, 10/3/2017 1:00pm) and "Last Updated By" (Amy Morris, 10/18/2017 12:17pm). Below these are "Start" (10/9/2017 12:00am) and "End" (10/22/2017 4:00pm) date pickers. There are also "Assign to" buttons for "All Pages" and "Selected Pages", with a "12 Selected" indicator and a "Select Page" dropdown.

In the foreground, a dark overlay shows a page selection menu for "Woodward Academy". The menu lists various pages with checkboxes: Home (checked), About, Admissions (checked), Welcome to Woodward, Create Your Path, Getting Started, Tuition & Financial Aid (checked), Key Dates (checked), International Students (checked), Request Info Confirmation, Open House (expanded), Admissions clonetest, Admissions- Trinity School, Admissions- Arbor Visit, Calendar, Fast Facts (checked), Woodward Wisdom (checked), New Students, Admissions Team (checked), Getting Started New, and FAQs.

A small tooltip on the right side of the menu says "Pop which you would like all by again?".

Timed Page Pops

COMING SOON!

- Page Pops are very useful in getting key info in front of a user
- You may have more success with a bit more subtlety -- the Page Pop should be welcome and informative, not an annoyance

Display Options

Assign to **All Pages** Selected Pages

Display Pop Again ⓘ

Delay Pop Display ⓘ

Display Pop after seconds

Display Pop after 50% of the page has been scrolled through

Personalisation Element

Use this on your homepage and landing pages to customize content based on geographic location!

Create segments based on continent, country, state and/or language.

The screenshot shows a personalization interface for 'International Students'. On the left, there are six filter rows, each with a 'Continent' dropdown menu, an 'equals' label, and a dropdown menu containing a continent name: Asia, Africa, Antarctica, Europe, Oceania, and South Amer. Below these filters is a green '+ AND' button. On the right, a preview of the content is shown. The preview has a title 'International Student Office' and a paragraph of text: 'WMA's rich history of enrolling and supporting international students began in 1847 when Monson Academy enrolled Chinese students, the first school in the United States to do so. Thai and Japanese students followed soon after. The international student body has remained a foundation of the school for more than 150 years and continues to this day.' Below this is another paragraph: 'The International Students Office at Wilbraham & Monson Academy exists to provide an information and support system for students from more than 30 countries. Students, parents, and families of our international students can expect a warm and welcoming experience when dealing with the office. Inquiries may be directed to Gayle Hsiao, Director, at ghsiao@wma.us or 413.596.9103.' This is followed by a section titled 'Resources available to current and new students at Wilbraham & Monson Academy include:' with a bulleted list: 'Making travel arrangements and ground transportation to and from the airport', 'New International Student Orientation schedule', 'Various themed meals', 'Bradley Airport (Windsor Locks, Conn.), bus, and train pick up and drop offs at all major breaks', 'English as a Second Language classes', and 'Student tutors who can assist in their native language'. At the bottom of the preview is a section titled 'Resources' with a sub-section 'Opening of School' and a paragraph: 'In advance of our opening of school for 2018 - 2019, WMA students will need to complete paperwork, make travel and end of summer plans and get ready for a great academic year. Information will be posted here when ready.'

Build your contacts database with Forms

COMING SOON!

Build your contact database directly from forms.

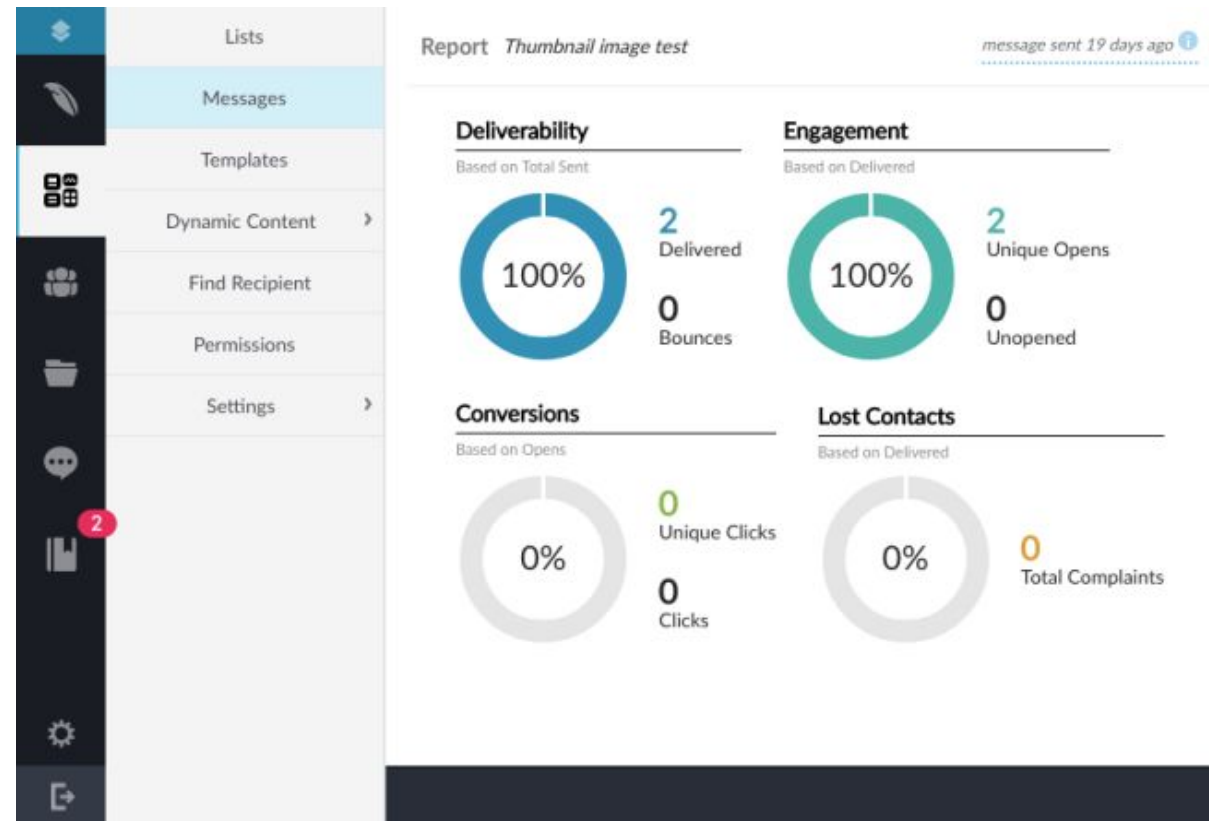
- New simplified Interface
- Leverage form data for use in Messages and Workflows

The screenshot shows a form builder interface for a 'Fall Open House' event. The form is titled 'Fall Open House' and is currently empty. The interface includes a 'Constituent Section Title' field, a 'Click to Add Content' button, and a 'First Name' field. Below the 'First Name' field is an 'Email Address' field. The form also includes a 'Why are you interested in our school?' field and a 'Which Open House do you wish to attend?' field with three radio button options: 'October 4 | 11am', 'October 5 | 11am', and 'October 12 | 11am'. The form is designed to be easily added to a database and used for messaging and workflows.

Nurture with Messages module

Send beautiful, mobile-friendly, personalised emails with the new Messages module

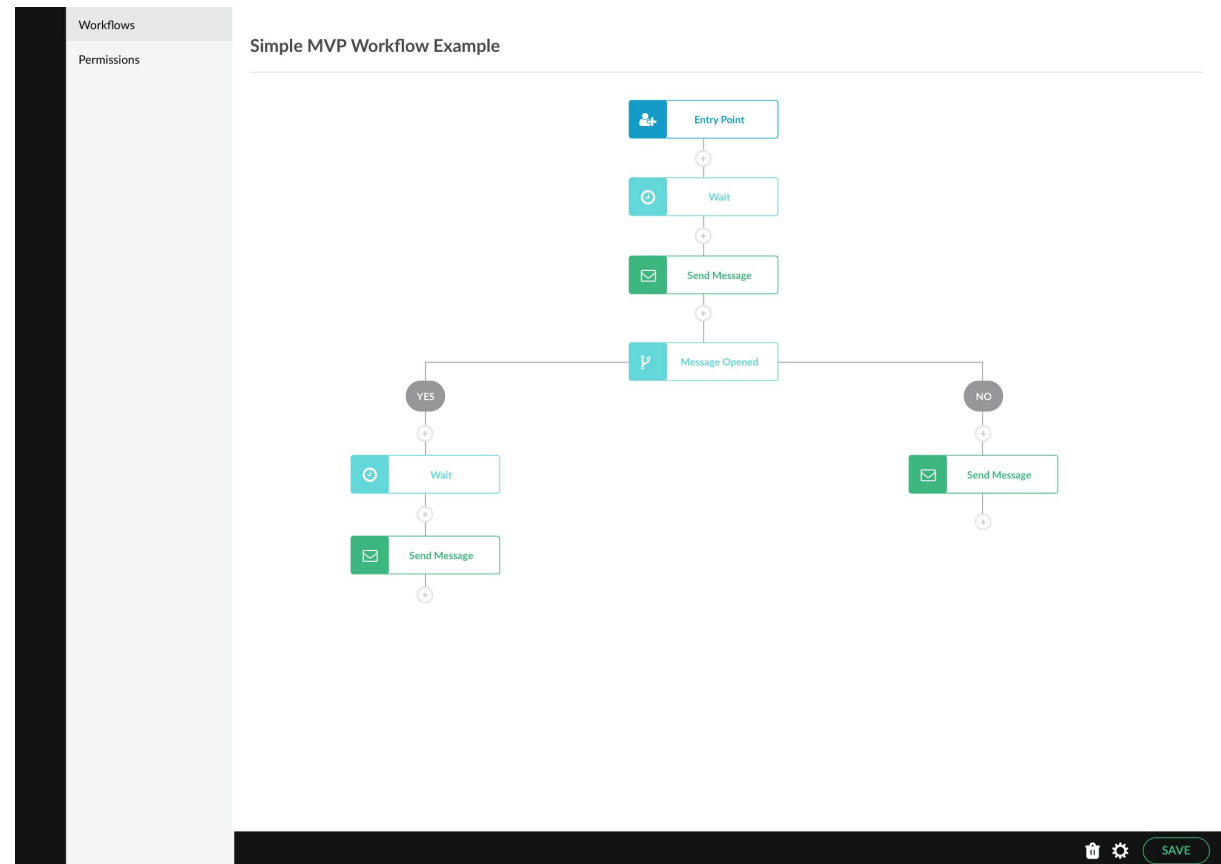
- Track delivery, opens and click-throughs
- Personalised Subject Line
- Resources Integration
- List segmentation



New Workflows Module

COMING SOON!

Automate simple email processes to nurture prospects to apply and enrol.



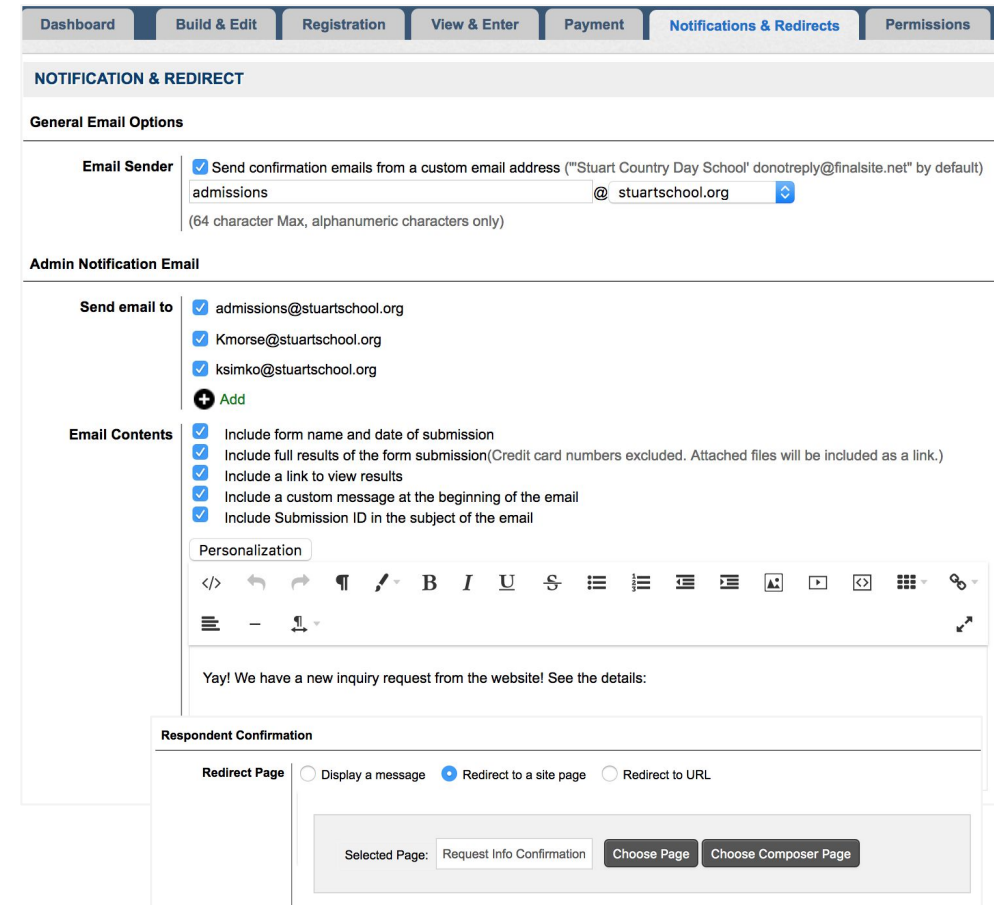
Simple Workflow in Forms

Create a custom respondent confirmation message

- Send them to a custom “thank you” page based on their submission
- Let them know to check their inbox for content, or display content on the page

Send an email confirmation with admissions info

- Buys your admission team time to reach out
- Provides prospect with immediate gratification
- Provides your team with enough follow-up info



The screenshot shows a configuration page for 'NOTIFICATION & REDIRECT' with several sections:

- General Email Options:**
 - Email Sender:** Includes a checkbox to 'Send confirmation emails from a custom email address' and a text field for 'admissions@stuar.school.org'.
- Admin Notification Email:**
 - Send email to:** A list of email addresses (admissions@stuar.school.org, Kmorse@stuar.school.org, ksimko@stuar.school.org) with checkboxes and an 'Add' button.
 - Email Contents:** A list of checkboxes for including form name, full submission results, a link to view results, a custom message, and the submission ID in the subject.
 - Personalization:** A rich text editor toolbar and a text area containing the message: 'Yay! We have a new inquiry request from the website! See the details:'.
- Respondent Confirmation:**
 - Redirect Page:** Radio buttons for 'Display a message' (selected), 'Redirect to a site page', and 'Redirect to URL'.
 - Selected Page:** A dropdown menu showing 'Request Info Confirmation' and buttons for 'Choose Page' and 'Choose Composer Page'.

New Integration with OpenApply

COMING SOON!

Automate the flow of data from OpenApply to Finals site to use in branded, personalised Messages and automated email workflows.

Segmenting Content with Portals

- Which types of individuals are visiting your site?
- How easy is it for them to find what they're looking for?
- Does the “journey” make sense?

The screenshot displays a student portal interface. On the left, there is a login section titled "Students" with the instruction "Please provide your username and password to log in:". Below this are input fields for "Username" (with placeholder text "Enter your username") and "Password" (with placeholder text "Enter your password"), a "LOGIN" button, a "Forgot Username or Password" link, and a "CHANGE MY PASSWORD" button. On the right, there is a navigation menu with tabs: "To-Do", "Announcements", "Athletics Schedule", "Schedules", "Forms", and "Counselor". Underneath, a sub-menu is visible with "Academic Resources" (highlighted in green), "Academic Calendar", "Senior Class", and "Lunch". Below the navigation menu, there are several content cards: "Middle School Course Catalog", "Upper School Course Catalog", "ADVANCED PLACEMENT® (AP) PROGRAM", "CONCURRENT CREDIT PROGRAM NORTHWEST UNIVERSITY", and "JANTERM".

Questions?

Thank You!

Thank you for attending our presentation.

Please review it on the app!



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