



Create more meaningful marketing with our Marketing Cloud Account Engagement solutions

**Increase donor acquisition, alumni
engagement, and retention with
personalized and timely fundraising
communications**



Our Account Engagement solution has three options to choose from with optional add-on features to fit your business needs:

FEATURE	BASIC	ADVANCED	PREMIUM
Discovery sessions	2	3	4
Sprint reviews	1	2	3
Lightning App setup	✓	✓	✓
Technical setup instructions	✓	✓	✓
Email templates	1	3	5
Engagement Studio programs	1	2	3
Training sessions	2	3	4
Users	5	8	10
Dynamic lists	3	6	8
Training documents	2	3	4
Custom fields	4	8	12
System integration testing	✓	✓	✓
Reports and dashboards	✓	✓	✓
Preference Center configuration			✓

ACCOUNT ENGAGEMENT SOLUTION ADD-ONS

Pick and choose from our add ons to further extend and customize your Account Engagement solution

Forms

Landing pages

Scoring customization

Grading

Data migration from existing email tool

Website tracking

Page actions

IP Warming strategy creation

Automation rules

Twilio integration

GoToWebinar integration

Business unit configuration

Preference center configuration (custom branding)

Account Engagement implementations typically take between 6-8 weeks.

At the end of an Account Engagement implementation with Redpath, your team will be able to take advantage of:

- +** Native Salesforce CRM integration
- +** Automated, dynamic recipient lists populated based on Salesforce data
- +** Mobile-friendly email templates
- +** Robust reports and dashboards to quickly analyze marketing engagement and effectiveness
- +** Automated email nurture programs
- +** Easily-customizable email preference center
- +** Prospect scoring

Alumnis and donors expect a seamless, thoughtful experience built on trust and perceived value from their alma mater or the school they support. This heightened expectation requires a proactive, long-term approach to constituent engagement, rather than a short-term, transactional one.

Does your current marketing tool allow you to create a personal approach for donors (without spending hours on manual tasks)? Does your organization struggle to understand what marketing content is most meaningful to your constituents?

Using a combination of Salesforce and Marketing Cloud Account Engagement, Salesforce's marketing automation tool, Redpath can help your institution's communications become more efficient and effective, enabling you to make a greater - and more meaningful - impact.

MEET PATH COLLEGE

Path College is a fictional university based on past Redpath clients and experiences. Path College, a Minneapolis based company, had been using Salesforce to manage its fundraising and events activities for several years. They had also been using Mailchimp to send email newsletters to current and prospective alumni and donors.



Finding a tool to match their marketing needs

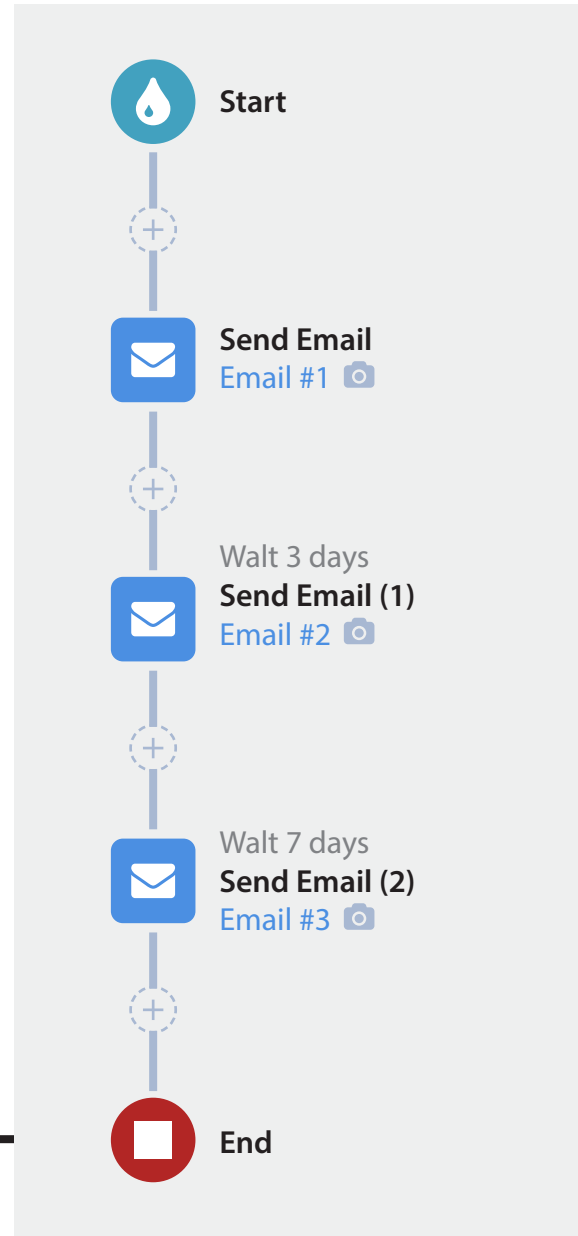
While Salesforce was working well to manage donations, Mailchimp was not integrated with the CRM. This lack of integration meant that each time Path College’s marketing team wanted to send an email to alumni and donors, they had to submit an IT request for a Salesforce report and manually import it into Mailchimp. Email engagement metrics were also not tracked in the CRM at all, so staff had no visibility into what types of communications donors had been receiving and how often.

After speaking with a Redpath representative, Path College decided that their organization would benefit from switching to a marketing tool that integrated seamlessly with Salesforce: Marketing Cloud Account Engagement.

Finding a solution

Redpath and Path College aligned on a plan to utilize Redpath’s Advanced Account Engagement offering. The Redpath team created three email templates and two automated Engagement Studio programs, which are automated “drip” or “nurture” campaigns consisting of a series of timely email sends and other touchpoints. Additionally, Redpath created several dynamic lists in Account Engagement, which automatically populate based on subscriber criteria and can be used as recipient lists for any type of email.

In addition, some of the add-on customizations addressed needs they were looking for, such as data migration from their Mailchimp subscriber list and a form and landing page for event registrations.



Marketing smarter, not harder

3 months after their Account Engagement implementation, Path College’s marketing team was working more efficiently than ever. They were able to automatically segment their audience based on a prospect’s major or a donor’s previous donation history and send targeted emails to each group, which has already resulted in a significant increase in donations.

They’ve even started an Engagement Studio campaign designed to move one-time donors to monthly sustainers, and have increased their sustainer base by 50%.

Path College is not only able to streamline their marketing campaigns and save time through automated list management, but they also have visibility into the engagement of each alumni and donor and the ability to create personalized follow-up touchpoints based on what matters most to them.

"We continued to work with Redpath post-migration to tidy things up and make sure automations and integrations were working smoothly. The consultants we worked with during this phase were excellent at not only helping us get things working and making adjustments, but also explaining the changes they were making so that we had stronger understanding of how it worked. We accomplished a lot in what was a brief and critical time for our organization."



PROCESS WORKING WITH REDPATH

Plan & Architect

Your subject matter experts (SMEs) will engage in a variety of discovery sessions with your Redpath team as we seek to understand all of your processes and system related needs. A solution design, along with a set of user stories, will be presented to your team at the end of the Architect phase for alignment and approval.



Validate Phase

When your Construct Phase is complete, Redpath will guide your Super Users through a series of training sessions and testing scenarios to validate that your system is functioning as expected. When all functionality has been approved, deployment begins.



Construct Phase

Your Redpath team will begin building your system in a sandbox to meet your requirements. Your build will happen through a series of 2-3 week sprints after which your Super Users and SMEs will have an opportunity to view a demonstration of your new functionality and perform a series of tests in a sandbox to gain alignment.



Deploy & Support

During this final phase of your project, your Redpath team will move all of your custom functionality to your production environment and perform a series of final tests. If a data migration is included in your project, this is also where all of your data will be migrated to its new home in Salesforce. During this time, your Super Users will be training your internal teams in preparation for go-live day. Following your move into your live system, Redpath will provide support to your team to ensure that everything is working well and your users are becoming comfortable in their new system.



Need help choosing the right solution for you?

Contact the Redpath team today for more information about our Account Engagement solutions to fit your organization's size, needs, and budget.

