

GATORCON 2020 4TH – 6TH FEBRUARY.

OLD THORNS MANOR HOTEL

#GatorCon2020

Live Q&A at sli.do event name **GatorCon2020**



ADVANCED WORKFLOW ELLIOTT PALMER

#GatorCon2020

Live Q&A at [sli.do](#) event name **GatorCon2020**



Agenda.

- What are Workflows & Why Use Them?
- Inspiration & Examples!
- How To Get Started?
- Now Build Your Own!
- What Did You Build?
- Q & A

What are Workflows

Let's Take a Look...

A marketing workflow allows you to tie together every individual element of your marketing automation strategy in one place. CRM, web tracking & triggers, email campaigns, timing delays and conditional logic, contact updates. All of it included in a single-view drag and drop builder, allowing you to see the entire picture!

Why not use standard GatorMail automation? Like follow ups and campaign series?

Ask our advice we are here to help...

Agenda.

- ~~What are Workflows & Why Use Them?~~
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Inspiration

What Types Of Workflows Can I Build?

What Types?

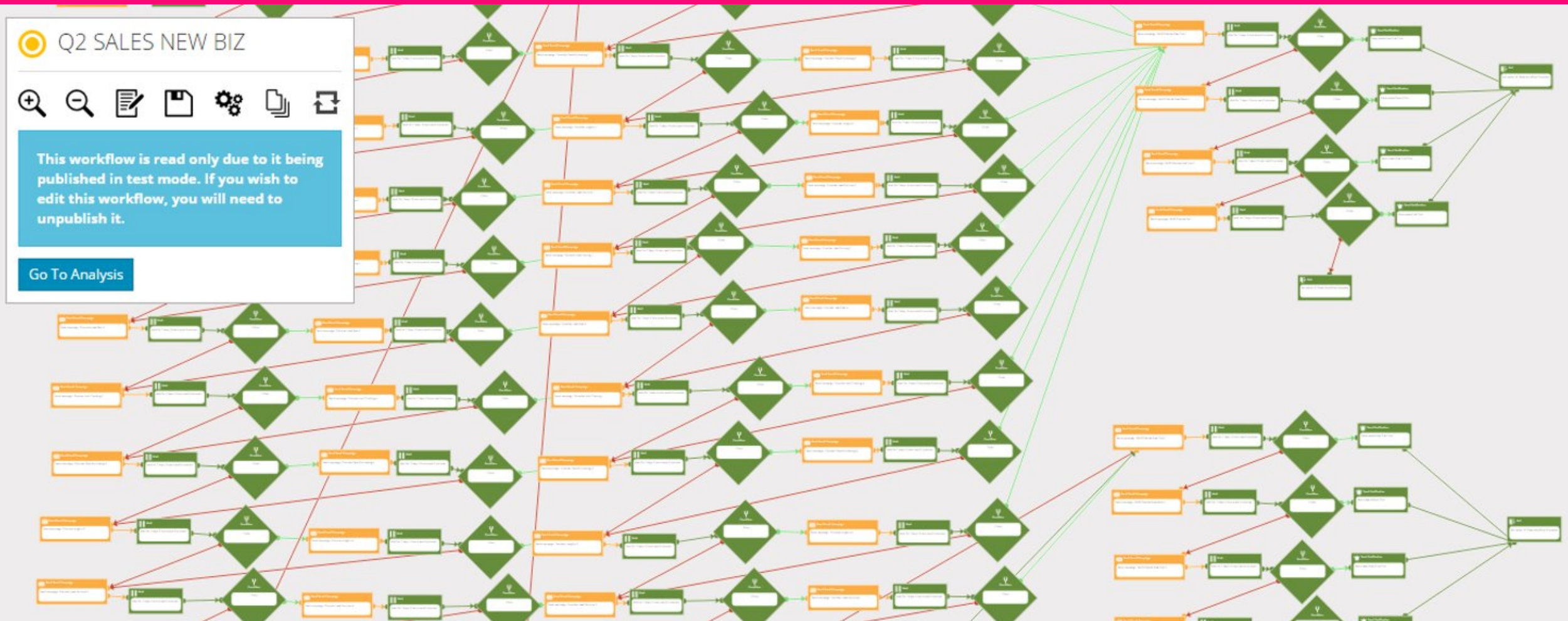
- Welcome Series
- Exit Intent/Win Back Workflow
- Nurture
- Asset Download
- Update Contact Records
- Event Bookings and Follow Ups
- Event Notification
- Contract Renewal Reminders
- Feedback

What Are The Entry Points?

- GatorGroup Logic
- CRM Logic
- Website Behaviour
- Web Forms
- Events Pre & Post
- Other Workflows!

Inspiration

Campaign Journey Could Look Like This!



Inspiration

Or Like This!

Q2 SALES NEW BIZ v2

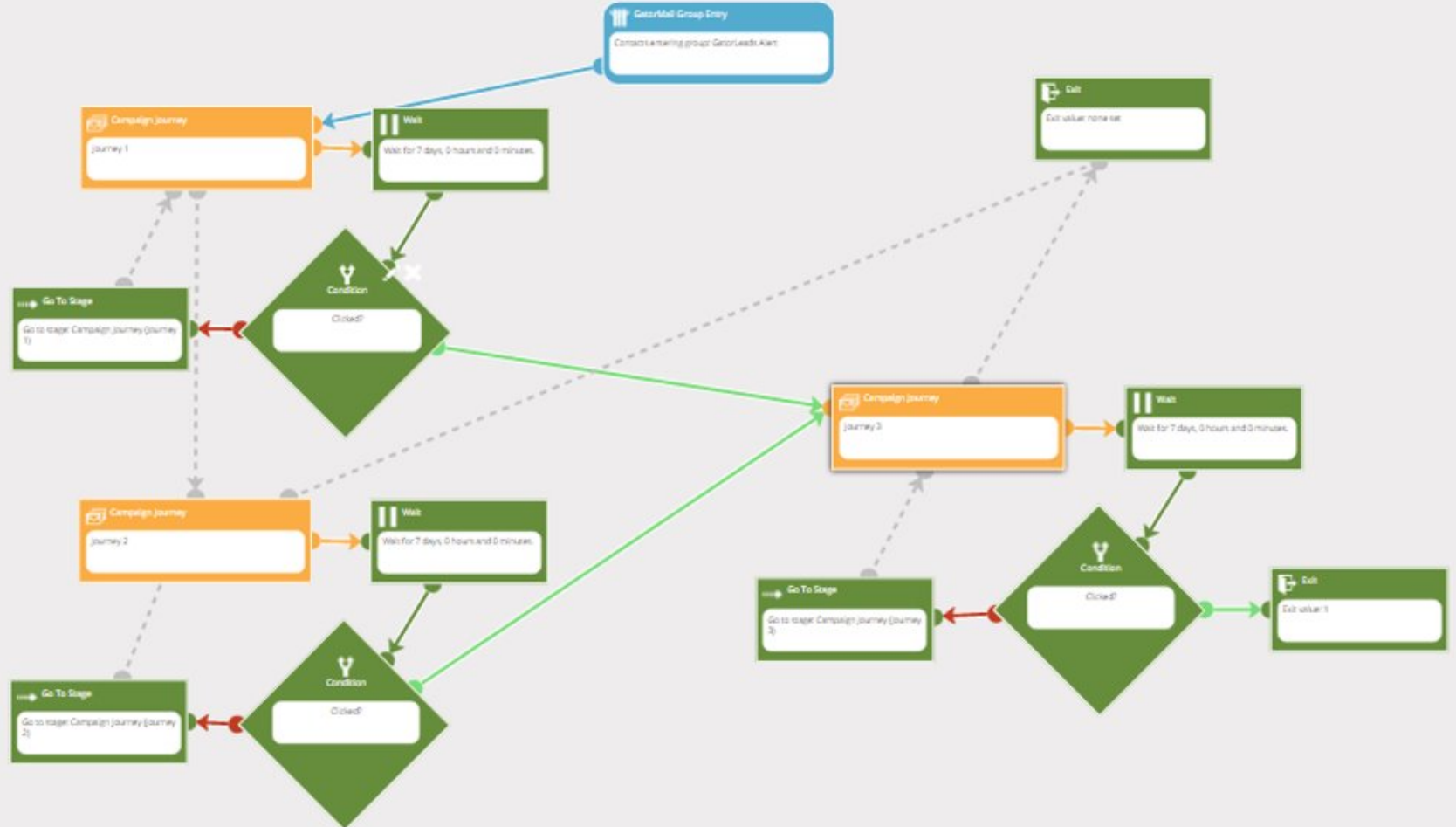
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Audience ⌵

- 👁️ GatorLeads Tracking
- 🔧 GatorWorkflow Completion
- 🗑️ GatorMail Group Entry

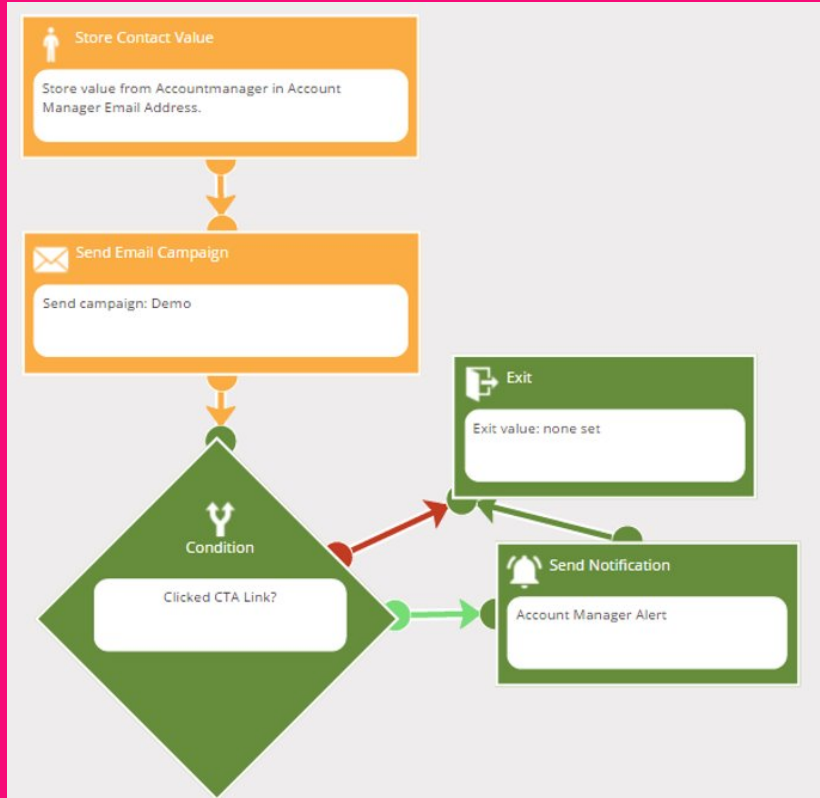
GatorMail ⌵

Decisions ⌵



Inspiration

Notifications



Send Notification

Sends a notification email message.

Description

Account Manager Alert

Email Addresses

Account Manager Email Address (Member)

Subject

[@contact->firstname] has clicked on our campaign

Message

Please give them a call on [@contact->phone] or email them on [@contact->email]

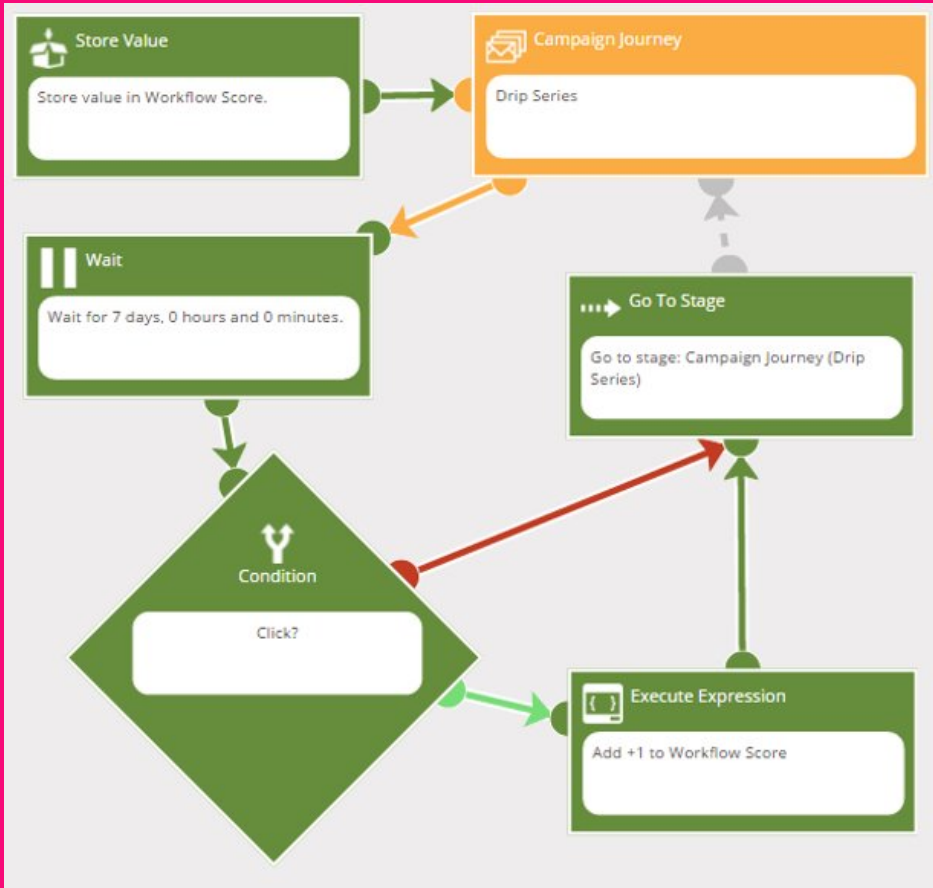
You can merge in stored values like so: **[@name]** (where name is the name of the stored value) and GatorMail contact attributes like so: **[@contact->attributeName]** (where attributeName is the attribute name).

OK

Cancel

Inspiration

Points Win Prizes



Store Value

Stores a named value which can be used throughout the workflow.

Name

Value

SV Type

OK

Cancel

Execute Expression

Executes an expression and stores the result of the expression in a stored value for later use in the workflow.

Details **Addition**

Description

Output

SV Type

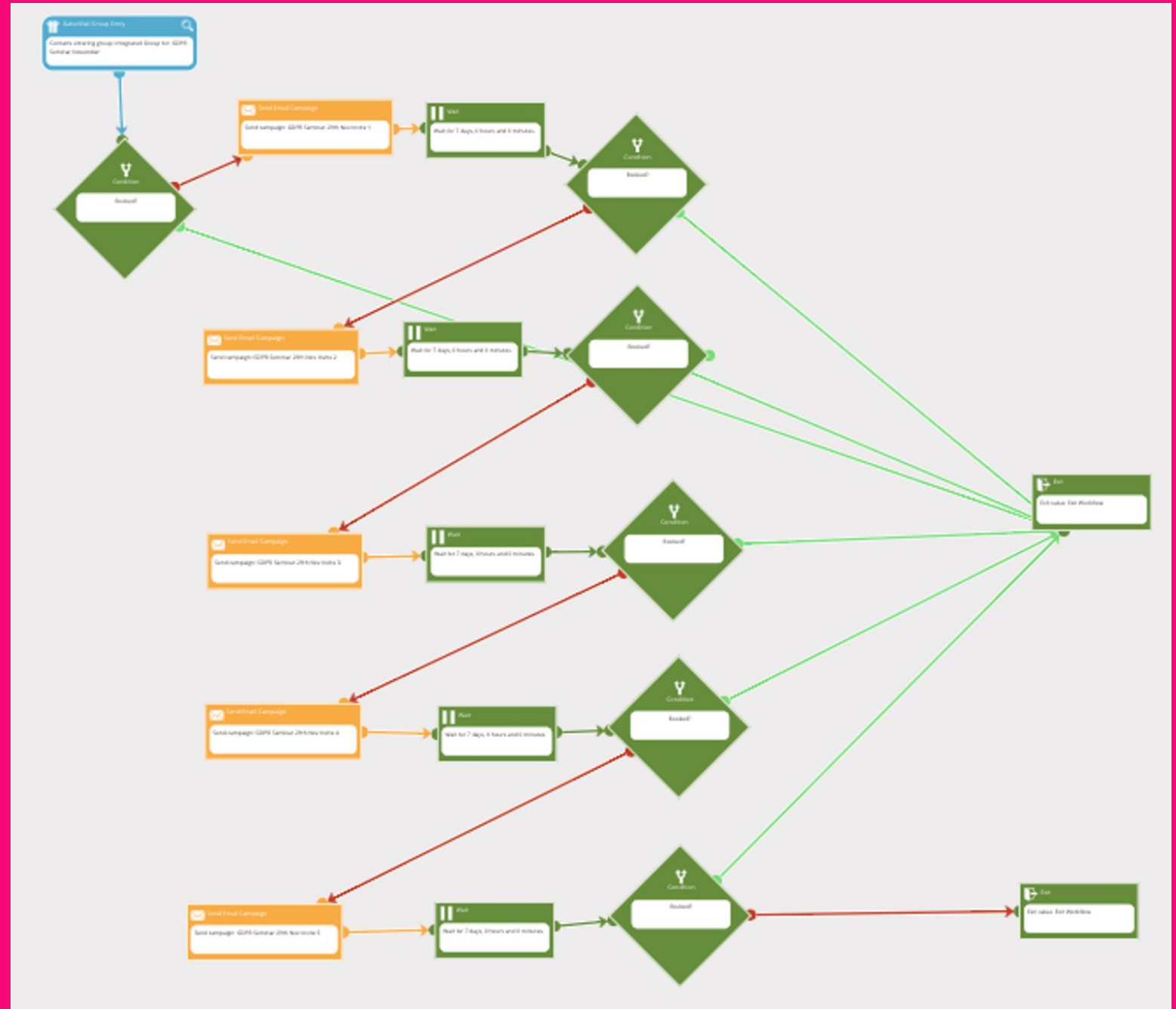
Type

OK

Cancel

Inspiration

Book On, Book On, Go On Book On!



Inspiration

Booked On:
You Can Keep It Simple

Send internal email - booked on event

Audience

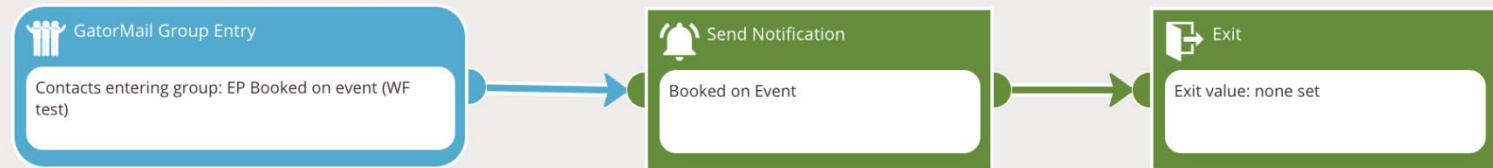
- GatorLeads Tracking
- GatorWorkflow Completion
- GatorMail Group Entry

GatorMail

Decisions

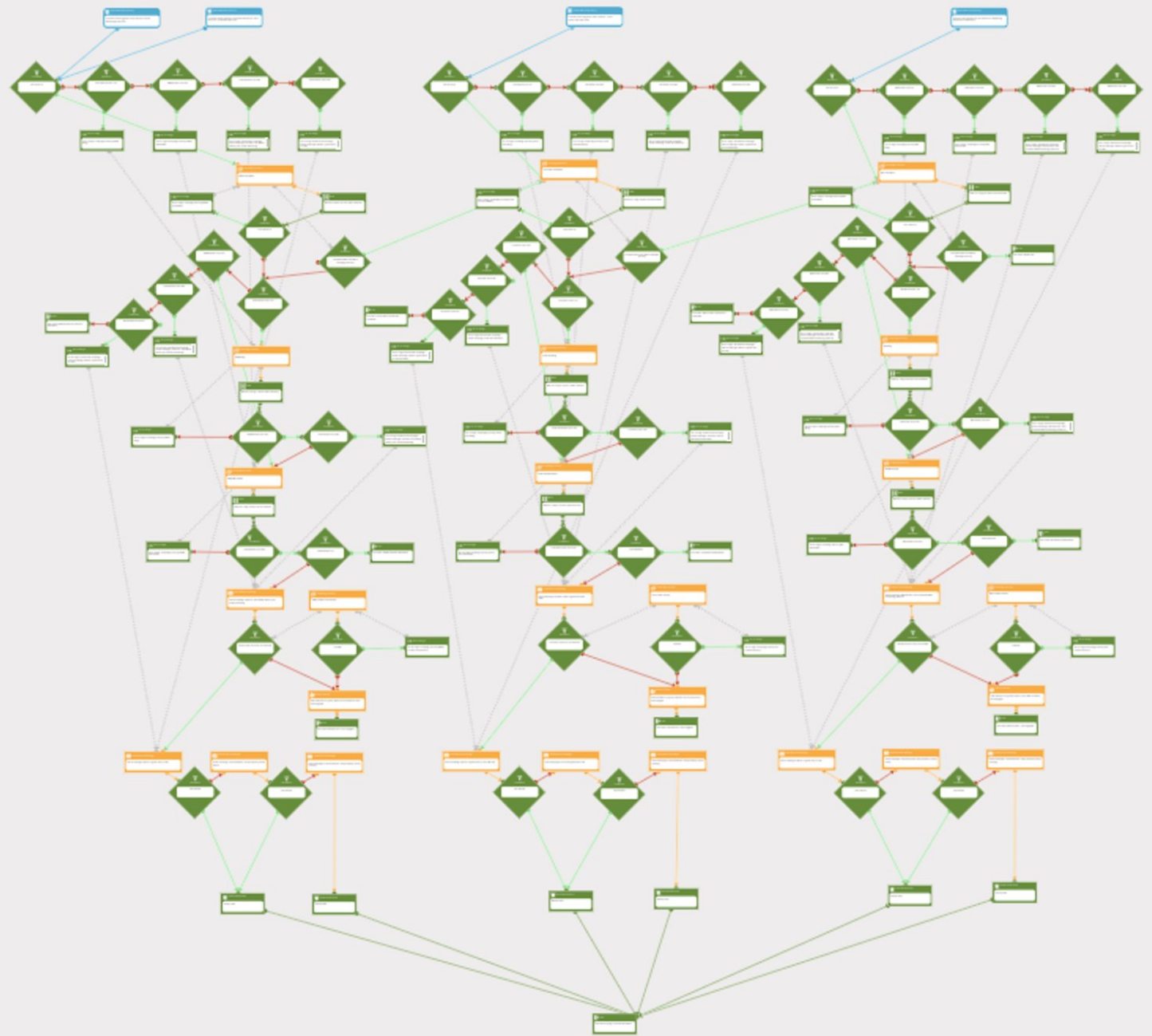
This workflow has members, view these in the analysis screen.

[Go To Analysis](#)



Inspiration

Or Go Mad!



Inspiration

What Was That Saying Again?

Oh Yes! Don't Run Before You Can Walk!

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Where Do I Start?

Looking At The Basics...

Save and Close

Save and Initiate

Save

Close

Campaign Detail - Demo

Detail

Email

Landing Zone

Survey

Follow Up

Merge fields

Send Test

Inbox Checker

Standard Details

Status: **In Setup**

Name: Demo

Notes:

Launch Date and Time: 26/07/2016 12:35



Close Date and Time: 26/07/2026 12:35



Type: Follow Up / Workflow Campaign

Action Type: Static

Sender Alias: Amy Johnson

Sender E-Mail Address (FROM): amy.johnson

@guru.gatormail.co.uk

Reply E-Mail Address (REPLY-TO): amy.johnson@communigator.co.uk

Where Do I Start?

Looking At The Basics...

The image shows a software interface with a workflow editor on the left and a dialog box on the right. The workflow editor has a top bar with 'Workflows', 'gatoradvancedElliott (gatoradvancedlz)', and 'Help'. Below this is a toolbar with icons for zooming, editing, saving, deleting, and refreshing. A list of workflow steps is shown, including 'Audience', 'GatorLeads Tracking', 'GatorWorkflow Completion', and 'GatorMail Group Entry'. The 'GatorMail Group Entry' step is highlighted. The dialog box on the right is titled 'GatorMail Group Entry' and has a description: 'Adds members in to the workflow based on their entry in to a GatorMail contact group.' It contains a 'Group' dropdown menu with 'Select Group' as the current selection. Below the dropdown are two buttons: 'Create Group' and 'Edit Group'. There is also a checkbox labeled 'Change member state when falling out of the group?' which is currently unchecked. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Workflows gatoradvancedElliott (gatoradvancedlz) Help

Untitled

Audience

GatorLeads Tracking

GatorWorkflow Completion

GatorMail Group Entry

GatorMail

GatorMail Group Entry

Adds members in to the workflow based on their entry in to a GatorMail contact group.

Group Select Group

Create Group Edit Group

Change member state when falling out of the group?

OK Cancel

Where Do I Start?

Looking At The Basics...

The screenshot displays a software interface with a sidebar on the left and a main content area. The sidebar contains a search bar labeled 'Untitled' and several menu items: Audience, GatorMail, Send Email Campaign, Campaign Journey, Add To Group, Remove From Group, Store Contact Value, Set Contact Value, and Decisions. The main content area shows a dialog box titled 'Send Email Campaign' with the description 'Sends workflow members a selected GatorMail campaign.' The dialog has a 'Campaign' label and a dropdown menu labeled 'Select Campaign'. A search input field within the dropdown contains the text 'work'. Below the search field is a list of campaigns: Gator Workflow Eight, Gator Workflow Seven, Gator Workflow Six, Gator Workflow Three, Gator Workflow Two, and Gator Workflow One. A 'Cancel' button is located on the right side of the dialog. At the bottom of the dialog, there are navigation arrows and a page indicator '1 of 1'.

Where Do I Start?

Looking At The Basics...

The image shows a screenshot of a workflow editor interface. On the left, a sidebar contains a list of workflow actions: 'Audience', 'GatorMail', 'Decisions', 'Wait', 'Condition', 'Store Value', 'Execute Expression', 'Send Notification', 'Go To Stage', and 'Exit'. The 'Wait' action is selected. A modal dialog box titled 'Wait' is open in the foreground. The dialog contains the following text and fields:

- Title: **Wait**
- Description: Pauses members for a period of time, before progressing them to the next stage.
- Wait Until: A dropdown menu with the selected option 'A time period has been reached'.
- Days: A text input field containing the value '1'.
- Hours: A text input field containing the value '0'.
- Minutes: A text input field containing the value '0'.
- Buttons: 'OK' (blue) and 'Cancel' (orange) buttons at the bottom right.

Where Do I Start?

Looking At The Basics...

The image shows a screenshot of a workflow editor interface. On the left, a sidebar contains a list of workflow stages: Audience, GatorMail, Decisions, Wait, Condition, Store Value, Execute Expression, Send Notification, Go To Stage, and Exit. The 'Condition' stage is highlighted. A dialog box titled 'Condition' is open in the foreground. The dialog has two tabs: 'Details' and 'Rules'. The 'Rules' tab is active. Below the tabs, there is a 'Description' text input field. Underneath, the 'Rule Execution' section has two radio button options: 'Execute rules as soon as a member enters this stage' (which is selected) and 'Execute rules periodically until a wait period is reached'. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Where Do I Start?

Looking At The Basics...

The screenshot displays the GatorFlow workflow editor interface. On the left, a sidebar contains a list of workflow stages: Audience, GatorMail, Decisions, Wait, Condition, Store Value, Execute Expression, Send Notification, Go To Stage, and Exit. The 'Exit' stage is selected, and a configuration dialog is open on the right. The dialog is titled 'Exit' and includes the following elements:

- Title:** Exit
- Description:** Removes members from the workflow, optionally setting an exit value which can be used in the *GatorFlow Workflow Completion* feed.
- Exit Value:** A text input field containing the text 'Exit Value'.
- Remove Member?:** A checkbox that is currently unchecked.
- Help Text (in an orange box):**
 - If "Remove Member?" is checked, members entering this stage will be removed from the workflow (along with all their workflow history and stored values) enabling them to re-enter via the audience stage(s).
 - An exit value is not required when removing a member as the member and all their workflow data is removed at the point they enter this stage.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

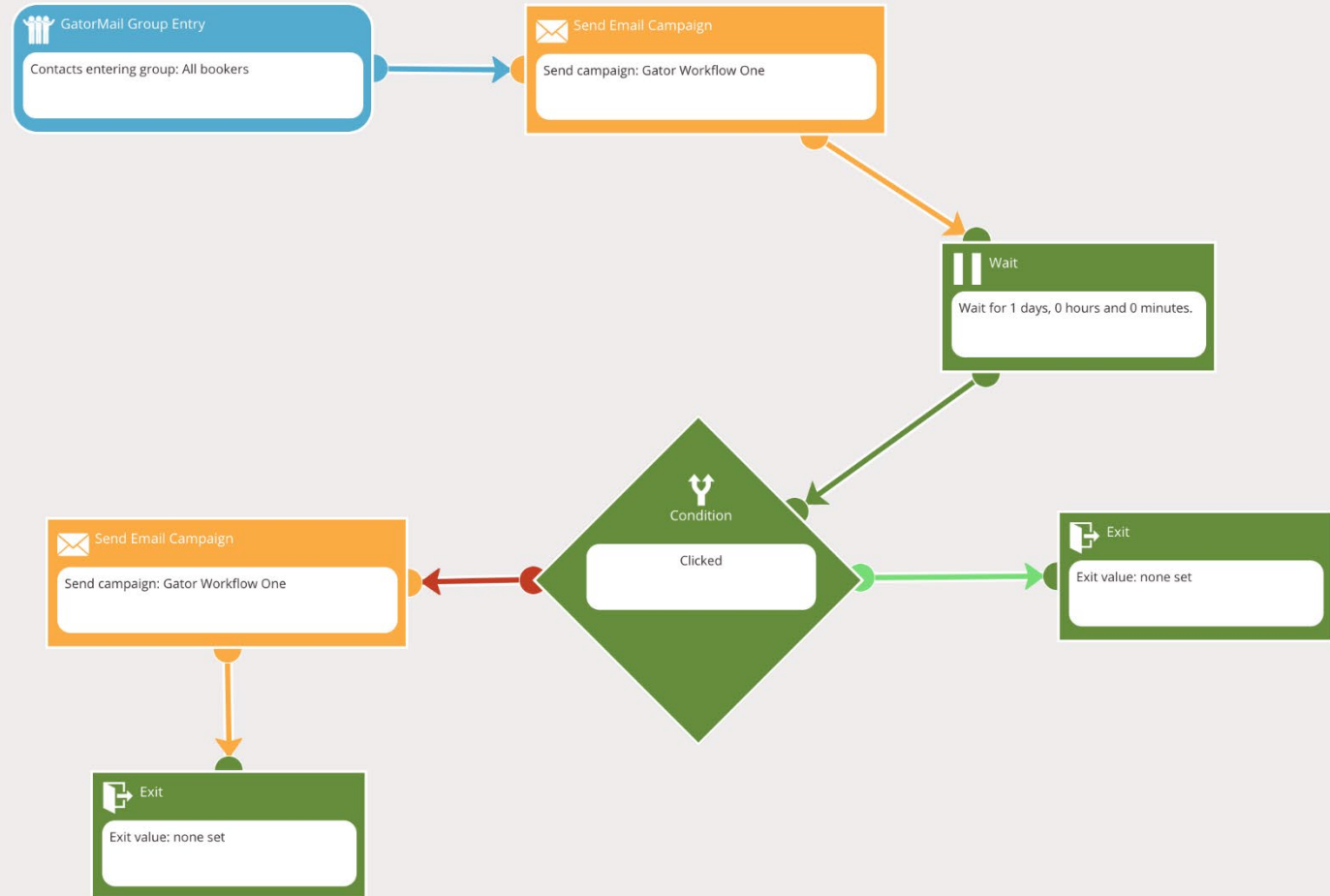
Where Do I Start?

Looking At The Basics...

Untitled

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- Audience
- GatorMail
- Decisions
- Wait
- Condition
- Store Value
- Execute Expression
- Send Notification
- Go To Stage
- Exit



Agenda.

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Now Build Your Own

Login & Get Started

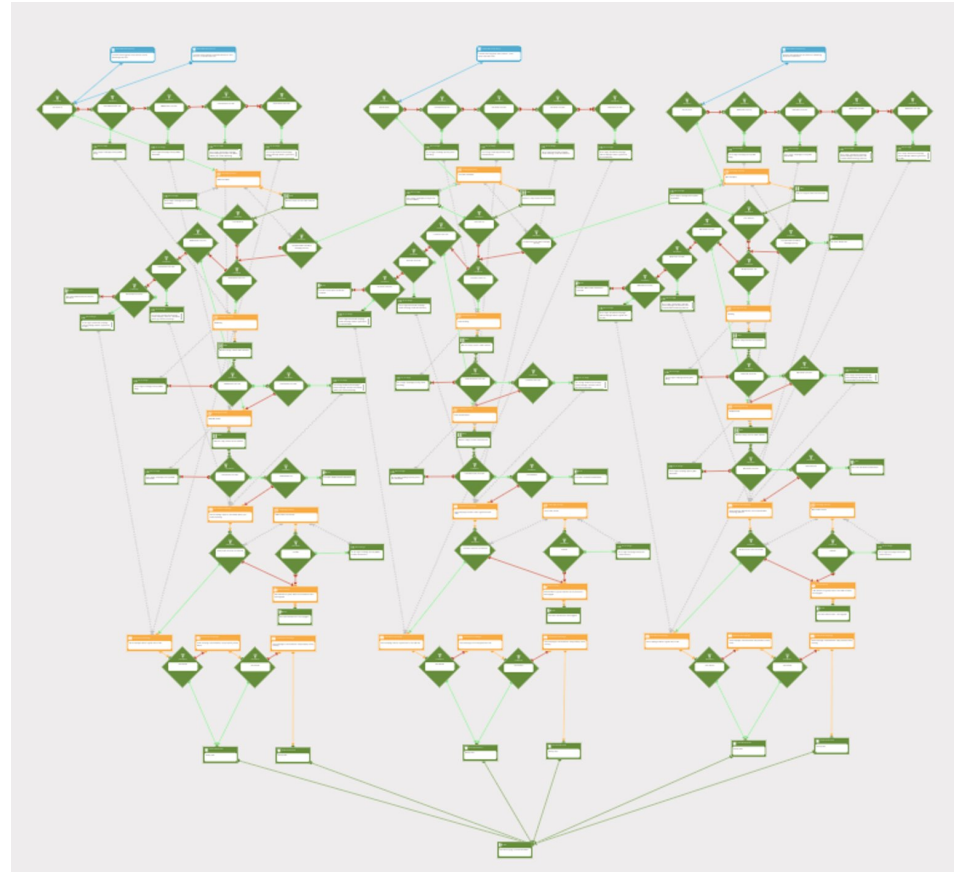
We Are On Hand To Help, Just Ask...

Agenda.

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What Did You Build?

Let's Take a Look...



QUESTIONS & ANSWERS

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