

ListEngage Case Study: National MS Society

"The blues moves" by Liz Holly
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Table of Contents

Introduction	3
About Multiple Sclerosis	3
The Need	3
One-to-One Connections	3
The Strategy	4
55% Open Rate ... On the First Email Send.....	4
What is an IP Warmup?.....	4
Segmenting the Subscribers.....	4
Lessons Learned:	5
The Formula	5
Identifying Subscriber Engagement Levels	5
The Scoring Process.....	5
One-to-One Journeys	6
Methodology.....	6
Rolling Out the First Automation – Bike MS	6
Are You Thinking of Switching to a New Email Platform?	7
Help Stamp Out MS.....	8
Carlos Monney – Getting Personal.....	8
Finding Help & Support	8
About ListEngage.....	9
About the National MS Society	9
About the Cover Art	10
Contact Us	10
ListEngage Project Team	10
National MS Society Project Team	10

Introduction

The vision of the [National Multiple Sclerosis Society](#) is bold – **A World Free of MS.**

As their mission states, the Society is committed to helping people affected by Multiple Sclerosis (MS) to live their best lives, as well as stopping the disease in its tracks and ending it forever.

True to their mission, the Society determined they needed a more effective way to communicate with their members, which led them to the Salesforce Marketing Cloud.

Todd Culter, Associate Vice President of Digital Marketing for the National MS Society, explains, “Our focus is to address the challenges of people living with MS, whether through funding research, education, advocacy, or providing services. In our marketing and communications, we need to be there for the types of engagements that our constituents seek and provide support the way they want it, when they want it, and where they want it. The Marketing Cloud allows us to do that.”

The Need

One-to-One Connections

The Marketing Cloud has provided the Society with the tools they need long term as they move toward a more sophisticated, one-to-one level of marketing. They hired [ListEngage](#), a longtime Salesforce services partner, to onboard them on the Marketing Cloud, create custom email templates, help set up their data, and warm up the new IP address.

While the peer-to-peer fundraising platform they have used for years has been a useful all-in-one product, it doesn't have the automation or customer journey functionality required to take their member engagement to the next level. The Marketing Cloud will allow the Society to tailor messages that meet each individual where they are at any given moment in the journey with MS –

About Multiple Sclerosis

MS is an unpredictable, often disabling disease of the central nervous system that disrupts the flow of information within the brain and between the brain and body. Symptoms vary from person to person and range from numbness or tingling, to walking difficulties, fatigue, dizziness, pain, depression, blindness and paralysis.

Most people with MS are diagnosed between the ages of 20 and 50, with at least two to three times more women than men being diagnosed with the disease. MS affects more than 2.3 million people worldwide.

Learn more at nationalmssociety.org. or by calling (800) 344-4867.

whether they have the disease or are a caregiver, family member, volunteer, donor, or an advocate for change.

“MS is a unique disease to every person who has it, which means each individual has a unique need or reason for engaging with the Society,” Todd said. “That’s why we need to be able to engage with people on a one-to-one basis, based on their goals and needs.”

The Strategy

What is an IP Warmup?

Sending emails from a new, dedicated IP address that hasn’t been “warmed up” first can damage your mailing IP reputation and cause your emails to go directly into the spam box.

To protect your IP address and sender reputation, you need to warm it up by sending small amounts of emails gradually over time to establish it as a legitimate email sender among the major Internet Service Providers (ISPs). Over the course of two to four weeks, you gradually increase the amount of emails sent until you’ve gotten through your list. Once this is done and you’ve taken care of any issues uncovered with ISPs, you’re IP should be ready to use.

55% Open Rate ... On the First Email Send

Most marketers would give an eye and a tooth to get a 55% open rate! The National MS Society got that on their first email send during their IP warmup.

The Society’s digital marketing team worked with ListEngage to narrow down their 2.2 million subscribers into smaller lists based on engagement rates over the past two years. The first email was sent to 60,000 of their most engaged subscribers, which resulted in a **55% open rate**.

“We knew starting the IP process right was critical,” Todd said. “I was very surprised at the open rate. Getting 55% of 60,000 people to do something is pretty amazing.” He attributes the cleanliness of the list, the engagement level of those subscribers, and having a relevant message as keys to the email’s success and in laying a foundation upon which to build their sender reputation.

Segmenting the Subscribers

By assigning a score to each subscriber, the team came up with 150,000 highly engaged subscribers to study. Through scoring subscriber engagement, the team realized they could predict certain behaviors based on the scores. Having defined their “highly engaged” subscribers will enable the Society to delve more deeply into who those individuals

are, what makes them so engaged, what their connection is to the organization, and formulate more targeted messages. And, over time, make the less engaged subscribers look more like the 150,000.

Lessons Learned:

- Realize there's probably a large portion of your lists that bring down the overall numbers.
- Score your subscriber engagement so you can focus more on those who are engaged.
- Clean up your list. The quality or value of the subscriber is more important than how many subscribers you have.
- Once you have subscribers broken into lists by level of engagement, tailor messages accordingly to reflect the relationship you have with each.

The Formula

Identifying Subscriber Engagement Levels

Carlos Monney, a Technical Lead for ListEngage, has been an integral part of the project from the beginning. The strategy he and the project team followed included:

1. Identifying the engagement levels of the 2.2 million subscribers
2. Removing duplicate email addresses from the list
3. Segmenting subscribers according to their connection to MS and demographic data
4. Finally, Carlos wrote a query that determined:
 - a. Email engagement score (how many emails were opened over the last 9 months)
 - b. Frequency percentile (how frequently the subscriber was engaged)
 - c. Recency percentile (how recently the subscriber was engaged)
 - d. Log in time (the last time the subscriber logged into the Society's website)

The Scoring Process

The Society used a simple scoring system that assigned 1 point for opens and 5 points for every email that had a click-through. Each subscriber was scored based on the following parameters:

- How many emails they opened
- How many click-throughs they had
- Whether they took an action as a result of a clickthrough
- Their frequency and level of engagement (e.g., made a donation within the last year, etc.).

One-to-One Journeys

The Society's ultimate goal is to begin introducing one-to-one journeys by localizing content, using personalized information, and making sure the message fits the actions of the individual.

Methodology

1. Split the audience into:

- People who live with MS. By knowing what type of MS a subscriber has and where they live, they will be able to customize each email to reflect local services and support
- Everyone else (caregiver, parent, volunteer, donor, etc.)

2. Collect the right data:

- Demographic data
- Engagement activity
- The connection to MS

3. Data collection points:

- Event registrations
- Predictive intelligence based on actions taken on the website
- Subscriber behavior
- Monitor click-throughs on emails to determine individual topics of interest
- Utilize dynamic content in emails and on the website based on behavior patterns identified.

Rolling Out the First Automation – Bike MS

According to Todd, the Society funds more research involving MS than any other non-government organization in the world. In 2015, they contributed \$56 million to research. The organization also provides services to individuals and families who need them.

[Walk MS](#) and [Bike MS](#) are their largest annual fundraisers. In March of 2017, the Society and ListEngage will be rolling out the Society's first automated retention campaign using the Marketing Cloud. This campaign will consist of customer journeys that will span 9 months in preparation for the Bike MS event and fundraiser in the fall. Eventually, every event will have a series of emails that will go out over a period of 9 months up until the event date.

The Society has 80 events, each with unique dates. Each event will have its own automated campaign with emails targeting past participants in an effort to get them to register for that event in the new year. By March, the marketing team hopes to have at least 40 of the events set up in Marketing Cloud.

The campaign for the first event will look something like this:

GOAL: Register past participants for the 2017 Bike MS event

STRATEGY: Create 16 different emails in a drip campaign that starts 27 weeks before the event. Once the rider registers, they drop out of the journey. ListEngage will be using Marketing Cloud's Automation Studio to automate the campaign.

- Multiple data sources (tables)

DATA SOURCES: Data tables for:

- Subscribers
- Events
- VIP
- Historical data from riders who have participated in the past 3 years
- Registration

One main unified Data Extension (table) will contain the data for all the above tables and will be populated by queries.

The teams at the Society and ListEngage are very excited about this first automation, because it's setting the foundation for everything that will be done in the future.

Are You Thinking of Switching to a New Email Platform?

It can be challenging switching from one email platform to another – especially if you are dealing with multiple systems and data sources. There are several things to keep in mind when choosing a platform:

- How much data do you have and where will it live?
- How will you capture your data and sync it to all the various sources and systems?
- How scalable is the platform? Can it grow as your company grows and your needs change?
- Is the platform well supported, stable, and secure?
- Can it handle dynamic content and customer journeys?
- Does it provide robust email design and content management tools?

- What other apps does the platform provider offer and how easily can they be integrated into your email marketing? (e.g., social media marketing, mobile push marketing, automations, etc.)
- Is there an experienced services company connected with the platform who can set it up for you, onboard your company, and provide training and support for your team?

If you'd like to save some time on scoping out all of the above, talk to ListEngage. We exclusively support the Salesforce Marketing Cloud and Salesforce family of products. We've been a Salesforce partner since 2003 and have an excellent reputation in the industry. Contact us today for a free consultation.

Help Stamp Out MS

In addition to participating in a fundraising event, anyone wishing to donate to the National Multiple Sclerosis Society can [get involved or donate here](#).

Carlos Monney – Getting Personal

For Carlos Monney, working on the National MS Society project isn't just business, it's personal. In 2012, Carlos's wife, Caroline, passed away due to complications from MS. She was 30 years old and had been battling the disease for 7 years. Caroline had Secondary Progressive MS, which continually attacks the brain and spinal cord. As Carlos reflected on their experience, he shared that the disease reduced his wife physically from a 6-foot tall marathoner to a frail 87-pound woman who could no longer move or talk.

Not only did MS break their hearts, but it depleted all of their assets, as well. "Even though I don't believe money buys happiness," Carlos remembers, "If we had had the money and resources we needed at that time, it would have given my wife a more comfortable life. There were times we needed money for medicine, rent or food. We were completely broke."

And what has working on the Society project meant to Carlos? He said it has reminded him how good the Society is and how much they help people. Even though email marketing may not seem like a way

Finding Help & Support

Managing MS is an ongoing process, beginning with the very first symptoms and continuing throughout the disease course. The disease happens to families, not just individuals. If you or someone you know has MS, visit the [Resources & Support](#) section of the National MS Society's website to find support programs and resources.

to make a difference, for those who have MS, a well-timed, personalized message that provides encouragement and support can be life changing. “If I can use what I know about the Marketing Cloud to help the Society deliver messages that help people on an individual level,” Carlos said, “then that’s one way I can give something back for all the help Caroline and I received when we were going through MS.”

About ListEngage

Since 2003, ListEngage has been committed to helping our clients succeed on the world’s most powerful one-to-one digital marketing platform – the Salesforce Marketing Cloud. We have helped hundreds of organizations like integrate with the Marketing Cloud and create meaningful customer experiences across multiple digital channels.

Our team of 50+ experts represents a high level of expertise and experience in digital and email marketing, outstanding technical skills, excellence in project and campaign management, and top-notch, mobile-responsive email design.

“It’s been wonderful working with ListEngage. I’ve been really impressed. There are a lot of intelligent, knowledgeable people at ListEngage, and we have a great relationship with them. The whole team has been excellent, and I’m really confident that the foundation ListEngage is helping us build will get us where we need to go both now and in the future.”

Todd Culter
Associate VP of Digital Marketing
The National MS Society

We support organizations of all sizes – from pre-project planning to full project implementation and training to post-project support.

Visit our [website](#) for more information, or [contact us](#) to set up a free consultation.

About the National MS Society

The National Multiple Sclerosis Society was founded in 1946 by Sylvia Lawry, whose aim was to cure her brother of MS. She led the Society as Chief Executive since 1982. The Society staff and nearly 500,000 volunteers carry out the day-to-day operations.

Since its founding, the Society has invested more than \$974 million to advance MS research and is recognized as the catalyst for all major advancements in MS. Approximately 75% of total revenue is devoted to research and services for people living with MS. Last year, the Society invested \$54 million to advance more than 380 research projects around the world. Through its comprehensive nation-

wide network of services, the Society also invested \$122.2 million to help more than one million individuals affected by MS connect to the people, information and resources needed to live their best lives.

The National MS Society partners with the healthcare community to promote access to quality healthcare. Information about MS and the Society's services are available 24-hours a day by calling **(800) 344-4867**.

About the Cover Art

We came across an article in [momentum](#), the magazine of the National MS Society, that featured some paintings by artist Liz Holly. Liz is an artist in Brooklyn, New York who was diagnosed with MS in 1994. Even though she has lost some of her mobility, Liz is determined to continue painting and "seeing the light." We appreciate Liz giving us permission to use her painting, "The blues moves," for our cover. [Read the article](#) in *momentum* or see more of Liz's work at www.lizholly.com.

Contact Us

If you have questions about this case study, please contact Lynette Rambo at ListEngage at (508) 271-7588 or email lrambo@listengage.com.

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