Workflow Guide Revamp

Includes these versions:

- Agnostic
- Healthcare
- Education
- FinServ

March 29, 2023

Q1 2023 Marketing Initiatives

	January	February	March

TIER 1

Platform Relaunch Work (e.g., new narrative, repositioning, brand marchitecture)
OKR: Transform to a Platform Company — **Launch in Q2 >>**

HIMSS 2023
OKR: Land — **Event 4/17-4/21 >>**

TIER 2

Converge 2023
OKR: One Formstack — **Event 2/6-2/9**

Website Resource Center Overhaul
OKR: Land — **Launch in March**

Snowforce 2023
OKR: Partner — **Event 3/2-3/3**

GDP 2023
OKR: One Formstack — **Event 4/10-4/13 >>**

TIER 3

New Year Shoutout Campaign
OKR: Expand — **Launched 1/10**

G2 Reviews Campaign
OKR: Land — **Launched 1/17**

Lookalike Campaign
OKR: Land — **Launch 3/15**

Lapsed Trial Email Series
OKR: Land — **Launched 1/25**

Workflow guides revamp (HC, EDU, FINSERV)
OKR: Land & Expand — **Launch 3/28**

Genius Webinar (Optimize your workday requests)
OKR: Expand — **Event 1/31**

Product Bundle Launch (including Genius Lab)
OKR: Expand — **Event 3/28**

Docusign Takedown Campaign
OKR: Land & Expand — **Launch 3/1**

Practically Genius Podcast Season 6
OKR: Land & Expand

Partner Playbook and Interview Series | *OKR: Partner*

Customer & Partner Testimonials | *OKR: Land, Expand, Partner*

Blogs & Builder's Blogs | *Driver: Land, Expand, Partner*

Campaign Overview

When analyzing our [Q4 2022 community survey](#), an overarching theme across open-ended responses was a desire for content that offers practical tips, tutorials, how-tos, or hacks. There was also a noticeable trend toward job-specific content (i.e., content focused on a specific industry or role).

Because of that, we are repositioning and repackaging our existing no-code workflow guides for healthcare, education, and financial services + creating a new industry-agnostic version for higher impact on our problem solver audience. These updated guides will provide stronger workflow automation inspiration and education by bringing the workflow examples to the forefront. They will also lean more into current economic times and the need for workflow automation and efficiency vs. being so heavy on the no-code economy angle.

Campaign Audience

Audience

Problem solvers across industries, with special focus on healthcare, education, and financial services

NOTE: We will add gates to these guides to bring in leads/MQLs through organic and paid channels. We will also maintain access to the ungated pages for use in customer campaigns.

Promotional Audiences

- **LinkedIn Paid**
  - Healthcare Guide:
    - Target size: 140,000+
    - Job: Digital Marketing Leader, Healthcare
  - EDU Guide:
    - Target size: 65,000+
    - Job: IT, Higher Ed, Seniority: Director, VP, CXO
  - FinServ Guide:
    - Target size: 350,000+
    - Users with a similar industry and role as our featured persona - who would benefit from Formstack
- **Email**
  - Healthcare Guide:
    - Targets - Healthcare Customers + C/L opps in last 12 months with industry = healthcare, lapsed trials healthcare, current healthcare trialers
  - EDU Guide:
    - Targets - EDU Customers + C/L opps in last 12 months with industry = education, lapsed trials education, current edu trialers
  - FinServ Guide:
    - Targets - FinServ Customers + C/L opps in last 12 months with industry = finserv, lapsed trials finserv, and current finserv trials
  - Agnostic Guide:
    - Targets - Customers + C/L opps in last 12 months , lapsed trials, current trials, Exclusions - Healthcare, FInServ, EDU

Workflow Guides

Launched 3/29

Overview

Repackaged our existing no-code workflow guides for healthcare, education, and financial services + creating a new industry-agnostic version for higher impact on our problem solver audience.

Overall Campaign Performance (as of 4/26):

Leads	MQLs	SROs	Opptys Influenced	Influenced Pipeline	Sourced Pipeline
249	8	4	7	$15,400 ARR *($2,000 MRR goal)*	$8,300 ARR *($1,000 MRR goal)*

Workflow Guides | Performance Breakdown

4 weeks post-launch (as of 4/26) - track against goals 90 days post-launch

	Unique Pageviews		New Users	Leads		MQLs		SROs		Opptys Influenced	Influenced Pipeline (ARR)	Sourced Pipeline (ARR)
	Actual	Goal	Actual	Actual	Goal	Actual	Goal	Actual	Goal			
Healthcare	269	1,500	33	46	115	3	38	0	2	5	$2.4K	$2.4K
Education	1,108	2,000	978	81	182	2	60	0	2	12	$3.9K	$3.5K
FinServ	139	2,500	57	33	300	0	100	1	2	3	$623	$1.4K
Agnostic	954	2,000	302	88	150	3	60	3	2	5	$2.8K	$1.7K

Paid Ad Performance

EDU Ads (3/29-4/25)

- *Impressions:* 204,983
- *Clicks to LP:* 927
- *CTR:* .45%
  (industry avg = .4-.5%)

Top-performing creative variation (by just a little bit):

Workflow Guides Upcoming Promo

- ~~**4/13: EMAIL | FinServ Guide (wave 2)**~~
  - ~~*Segment:* 2,120 mailable contacts~~
- ~~**4/24: EMAIL | Agnostic Guide (wave 1)**~~
  - ~~*Segment:* 27K (Newsletter + Current Customers (already in Pardot)) mailable contacts~~
- ~~**4/25: EMAIL | April Customer & Partner Newsletters (agnostic guide)**~~
  - ~~*Segment:* ~47K mailable contacts~~
- ~~**5/1 - 6/11: PAID SOCIAL | LinkedIn Ads (healthcare guide)**~~
  - ~~*Segment:* 120K~~
- **5/3: Retro!**
- **5/9 (end date): PAID SOCIAL | LinkedIn Ads (education guide)**
  - *Segment:* ~43K
- **5/11: EMAIL | Education, Healthcare (wave 2), Finserv (wave 3) Guides**
  - *Segment:* ~5K mailable contacts (education), ~2K mailable contacts (healthcare), ~3K mailable contacts (finserv)
- **5/19 - 6/29: PAID SOCIAL | LinkedIn Ads (finserv guide)**
  - *Segment:* ~150K

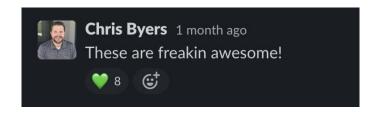# Workflow Guides | Performance Breakdown

5 weeks post-launch (as of 5/2) - track against goals 90 days post-launch

	Unique Pageviews		New Users	Leads		MQLs		SROs		Opptys Influenced	Influenced Pipeline (ARR)	Sourced Pipeline (ARR)
	Actual	*Goal*	*Actual*	*Actual*	*Goal*	*Actual*	*Goal*	*Actual*	*Goal*			
Healthcare	1,791	1,500	68	47	115	3	38	0	2	3	$2.2K	$2.2K
Education	1,176	2,000	978	82	182	3	60	0	2	11	$6.3K	$3.5K
FinServ	146	2,500	57	35	300	0	100	1	2	3	$594	$1.5K
Agnostic	1,124	2,000	309	592	150	7	60	4	2	17	$10.3K	$4.4K

Takeaways

WHAT WORKED

- **TEAMWORK & COLLABORATION & BEING AGILE & ITERATING** when the scope grew we rose to the occasion! Distribution of tasks and responsibilities worked well and helped get tasks done on the tight timeline.

- **New project brief template helped.** Able to make sure we were taking the right things into consideration.

- **Look and feel!** The new guides are a major upgrade from the originals. They look a lot more cohesive and are easier to navigate.

- **Experimenting with new resource center.** The sidebar TOC was a helpful addition.

- **Meeting cadence & organization.** Meetings kept everyone informed and up to date.

Chris Byers 1 month ago
These are freakin awesome!

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Takeaways

WHAT TO OPTIMIZE

- **Scope creep.** Initial goal was to have these be tier 3, but by updating the look/feel, using the resource center template, a new gating technique, and increasing promo efforts, this became a tier 1 campaign competing against other tier 1 projects like Converge and the Spring Release. Be more intentional about sticking to intended scope moving forward and taking stock of competing efforts (have done with Q2 planning).
- **Content + design sync earlier.** Creative iterating felt slightly rushed (but know timing wasn't on our side with Converge) – so want to sync sooner rather than later on what theme of content pieces will be so we can start brainstorming look/feel for the guide.
- **Tough to do multiple guides at once.** Get approval on design/layout and copy of single guide before executing for others to avoid confusion and changes. Would love to waterfall out next time if we do multiples.
- **Be clearer about promo plans.** Figma is really helpful for seeing the routing aspect, but ensure calendar list view is socialized as well to alleviate confusion.
  - **Consider audiences at the soonest possible point.** Design campaigns + promo plans to fit each audience being touched (i.e., partners).
- **Define goals sooner.** Are we able to have benchmarks to reference for these types of campaigns moving forward? Is there a procedure for campaign forecasting? Think some conversion work is in progress, would love updates as this happens!

Resource Center Reno

Recap: Complete overhaul of the resource center launched Friday 4/21 - including new nav organization, page designs and backend CMS structure. Why?

External Goals:

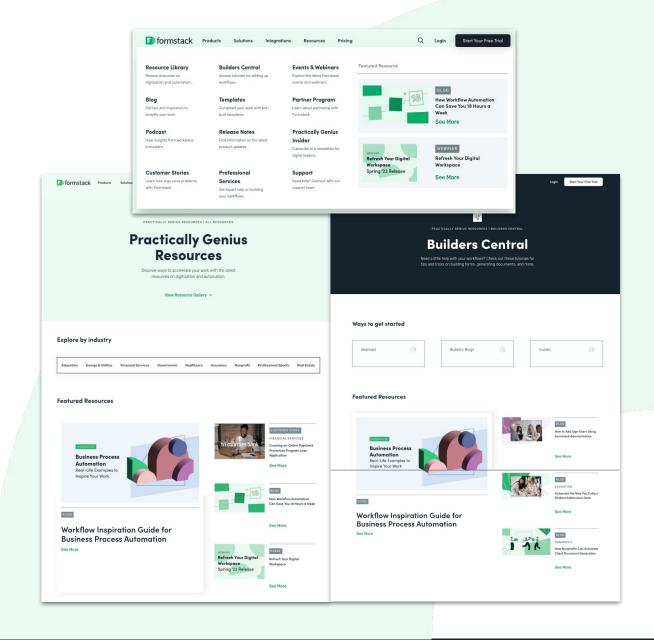- Improve the user experience
- Increase conversions
- Drive pipeline

Internal Goals:

- Improve the user experience for internal editors within Webflow

Status: L👏A👏U👏N👏C👏H👏E👏D. A handful of lingering bugs and styling issues are noted and being addressed.

Next Steps:

- Remaining bug fixes noted in this sheet
- Blog tagging efforts continue this month
- "Phase 2" ideas have been logged in Figma

Takeaways - Resource Center

THE PEOPLE LOVED IT!

Lindsay McGuire 9:15 AM
Asked a contributor to the blog what he thought about the recent changes: Yes, I did check your blog. I really like the way it is organized and categorized. Makes it easy for the readers to check for articles they want to read about . Also your work flow articles are very insightful.

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Lindsay McGuire 9:34 AM
Asked Brett, the founder of terkel who provides us guests posts once a quarter, what he thought of the overhaul: Post looks great, the Resource Center looks even better. Congrats on the overhaul. Curious about what impact you'll see on the SEO front.

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Elle Woulfe 2:29 PM
Late to this party but I am in love with the new resource center and particularly the drop down. So slick and so much more modern. 🌮🌮🌮 @AZ

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Takeaways - Resource Center

WHAT WORKED

- **Feedback during design process.** Took the time to consider what would help us improve each section of the resource center, with dedicated meetings to discuss needs and ideas. The user interviews were a good idea as well.
- **Navigation.** The main nav provides easier ways for visitors to find what they need, and the TOCs on longer content pieces make for a better experience since people can more easily scan and jump around.
- **Organized QA.** Having the QA sheet and dedicated assignments made that process more efficient.

Lindsay McGuire 9:15 AM
Asked a contributor to the blog what he thought about the recent changes: Yes, I did check your blog. I really like the way it is organized and categorized. Makes it easy for the readers to check for articles they want to read about . Also your work flow articles are very insightful.

🙌🙌🙌🙌 4   🙍 3   👍 1   😊

WHAT TO OPTIMIZE

- **Communication could have been better.** There were many details that weren't clearly accounted for in the timeline, and we frequently brushed over this major project in Digital Squad meetings. There were also some URL/301 issues that popped up at the last minute because of a lack of communication.
- **Webflow limitations**. Webflow requires quite a bit of back-end work to clean things up and get them looking and functioning as intended. Also, the way we have to feature content with priority fields doesn't seem sustainable.
- **Approvals.** Could improve clarity on final approvals and decisions (when they were made and what was the conclusion). One final walkthrough of the master Figma before dev started might have been helpful.
- **Launch week planning/timing.** Dev needed more time allotted to ensure functionality. GDP and HIMSS meant the team was short handed during the launch week.

Goals - 48 hours

From launch to 90 days post-launch

	New Users		Leads		MQLs		SROs		Opptys Influenced
	Actual	Goal	Actual	Goal	Actual	Goal	Actual	Goal	-
Healthcare	91	1,500	41	115	0	38	0	2	3
Education	682	2,000	73	182	1	60	0	2	11
FinServ	33	2,500	16	300	0	100	0	2	1
Agnostic	56	2,000	11	150	0	60	0	2	1

$14,700 ARR influenced pipeline ($2,000 MRR goal) | $0 MRR sourced pipeline ($1,000 MRR goal)

Email Performance (48 hrs post-send)

- Digital | WFG Announcement | EDU | Q123
  - Audience: 6,272
  - Open Rate: 21.84%
  - Click-Through Rate: 1.24%
  - Opt-Out Rate: 0.88%
- Digital | WFG Announcement | Healthcare | Q123
  - Audience: 1,663
  - Open Rate: 23.26%
  - Click-Through Rate: 1.85%
  - Opt-Out Rate: 0.57%
- Digital | WFG Announcement | FinServ | Q123
  - Audience: 6,780
  - Open Rate: 1.31%
  - Click-Through Rate: 0.30%
  - Opt-Out Rate: 0.09%

Campaign Promotion

Content + Website
- *Cross-promotions:* Homepage Banner 3/29
- *Pendo:* agnostic guide playbook- Split with Bundle Webinar on 3/28
- *Blog:* Agnostic guide - Split with Bundle Webinar on 3/28

Promotion
- *Email:* Newsletter feature in Partner 4/20, Customer 4/20, & PG Insider 4/6
- *Paid:* LinkedIn ads 4/6-20
- *Other:* Terminus (Employee Email Signature Banner), Organic Social 3/29

Sales Enablement
- *Sales newsletter feature* (March)
- *Seismic:* page with documentation & talking points, Launch by 3/10

Comms
- *Internal Comms:* Slack announcement + Tuesday with Tammy 3/29
- *NOTE:* cross promoting in the bundle release follow-up 3/29

Content + Website
- *Cross-promotions:* Vertical Pages (TBD) 3/29
- *Blogs:* 3/29 Finserv (update), 3/30 Education, 4/4 Healthcare

Promotion
- *Email:* Announcement emails to customer verticals 3/29
- *Paid:* LinkedIn Ads by target persona, gated link 3/29-5/19
- *Other:* Dedicated Partner email send (date TBD), Organic social to gated link 3/29

Sales Enablement
- *Sales newsletter feature:* March Newsletter 3/27
- *Seismic:* page with documentation & talking points, Launch 3/28

Comms
- *Internal Comms:* Slack announcement + Tuesday with Tammy 3/29

Want the details?
[Check the Monday Board](#)

Check-in Cadence
- Kickoff 2/16
- Workflow Guide Revamp Sync- Weekly on Thursday
- Live Ready 3/28
- Launch 3/29
- Running till 6/29

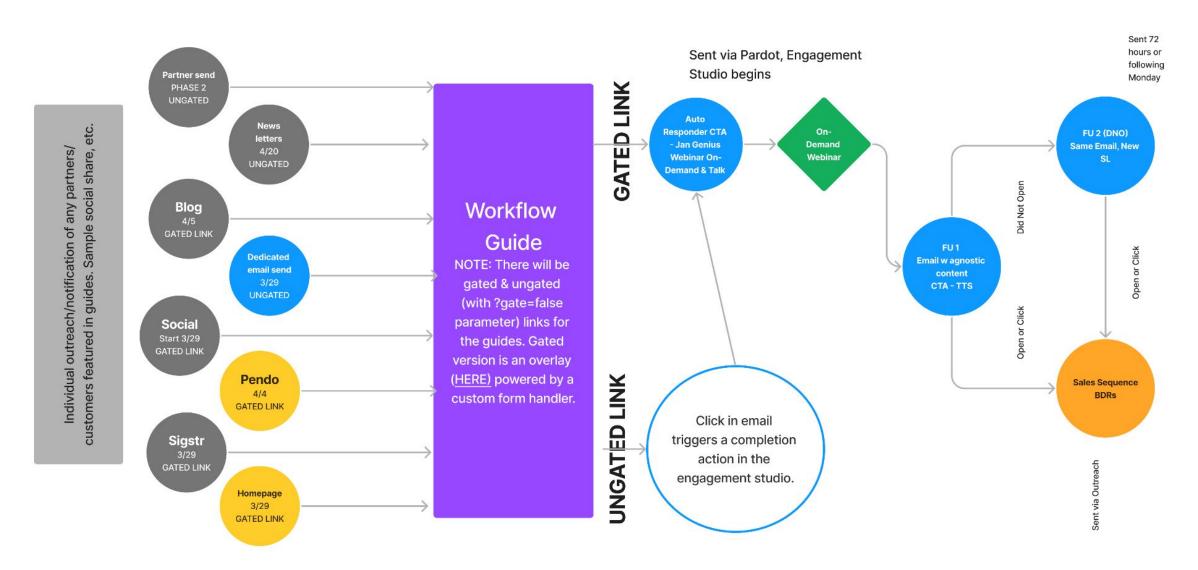# Promotional Calendar
Formstack, Organic & Paid

- 2/16 | Kickoff call
- 2/16 - 3/3 | Guide copy
- 3/6 - 3/10 | Guide design
- 3/6 - 3/10 | Promo copy
- 3/13 - 3/17 | Promo design
- 3/13 - 3/17 | Webflow build
- 3/24 | QA
- 3/27,28 | Sales Enablement: training + documentation + newsletter
- 3/28 | Bundle webinar share
- 3/29, 4/5 | Bundle webinar follow-up
- **3/29 | Launch**
- 3/29 | Website: Homepage banner (agnostic guide)
- 3/29 | Website: Cross-promos on relevant pages (industry guides)
- 3/29 | Email: Dedicated sends to vertical customer/prospect lists (industry guides)
- 3/29 | Email signature (agnostic guide)
- 3/29 | Pendo: all products (agnostic guide)
- 3/29 | Social promo
- 3/29 | Internal: Tuesdays with Tammy
- 3/29 | Internal: Slack (#announcements, #marketing_public)

- 3/29 | Paid social: LinkedIn ads (edu industry guide)
- 4/6 | Email: April Practically Genius Insider (agnostic guide)
- 4/20 | Email: April Customer & Partner newsletters (agnostic guide)
- 5/1 | Paid social: LinkedIn ads (healthcare industry guide)
- 5/19 | Paid social: LinkedIn ads (finserv industry guide)
- 3/29 | Blog: Finserv promo (update)
- 3/30 | Blog: Education promo
- 4/4 | Blog: Healthcare promo
- 4/5 | Blog: Agnostic promo
- 4/11 | Email: Partner dedicated send

Routing (Agnostic Guide)
Full routing by vertical HERE

Campaign Look/Feel

Email Look Book

Gate Confirmation Email
View full size

Hi Erin,

Thank you for requesting access to our guide "Healthcare Automation: Real-Life Examples to Inspire Your Work." We hope it gives you ideas for automating the work that matters and creating better digital experiences for your patients.

If you want to learn even more about workflow automation with Formstack, contact our sales team or watch our Genius Webinar on automating application workflows.

Watch the Webinar

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Healthcare Automation: Real-Life Examples to Inspire Your Work

Patients want easy digital experiences and rapid responses. Is your organization keeping up? Luckily, meeting these expectations doesn't require a massive budget, timeline, or IT team. All you need is the right technology and a bit of guidance.

To help you master your workflows, we've put together a guide that provides real-life automation examples from leading healthcare orgs like Indiana Health Group, University of Tennessee Medical Center, and InHouse Physicians. Learn how to build efficient workflows that delight patients and power all areas of your organization.

Get the Guide

Inside the guide, you'll find:

- 7 healthcare workflow examples that can help you save time and money
- Step-by-step guidance on building digital workflows across departments
- Tips for connecting your most-used tools to create better experiences

Follow-up
View full size

Create the digital-first experience that your patients expect

Hi {{Recipient.FirstName}},

The last few years have created rapid changes across all areas of healthcare, but few things have accelerated as quickly as the need for digital patient experiences. Has your organization been keeping up?

To better understand how digitization can help you improve patient retention and loyalty, we interviewed leading experts in the field. Here are their insights and strategies on going digital and how it can help you improve patient satisfaction.

Hear From Experts

Curious how Formstack can be used to simplify your healthcare workflows? Contact our sales team to learn how we can help you create exceptional patient experiences and save over 13 hours per week on manual work.
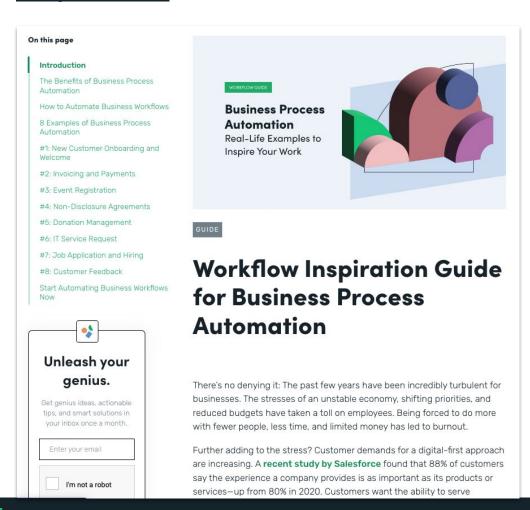
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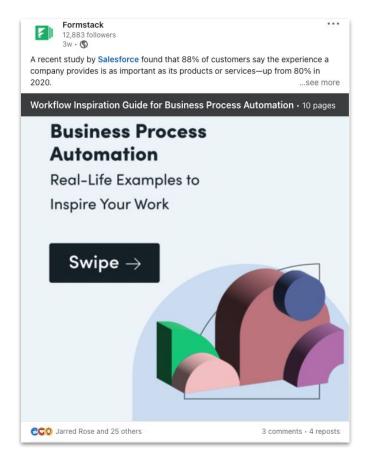Fishers, IN 46038

Assets & Creative | Agnostic

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Guide Page
[View Healthcare Guide here](#)

Paid - LinkedIn
[View all here](#)

Social - Carousel
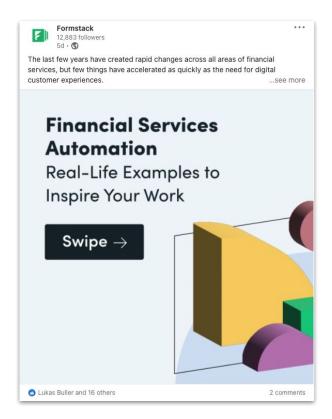[Sample on Instagram](#)

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