YOUR ULTIMATE CLIENT COMMUNICATION GUIDE

Using an Online Registration Software
to Automate Client Communication

What you'll find in this eBook:

- Effective strategies for using the automated communication tools of an online registration software.
- Comprehensive list of communication features to look for in an online registration software.
- How to improve connection with clients and get registrants paying and acting faster.
- How to evaluate the price of online registration software and choose the best one for your organization.

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PART 1: INTRODUCTION

Automation is now used to create more personalized communication and interactions between organizations and clients.

One thing we've found time and again from our clients is that once they begin using an automated registration system for their business, the meaningful time they were able to communicate with clients increased and their headaches and wasted time from registration issues decreased.

When you can move from one person taking care of 100 applicants to one person taking care of up to 500-1000 applicants in the same amount of time, it's not surprising that communication is moving in a more personalized direction.

Nonetheless, there are many businesses out there, especially the small and medium sized ones, who still feel that automation will take the heart out of their creation. And more importantly, they feel like the cost of implementing this kind of automatic process will be prohibitive for them.

Automation means more contact with clients, not less.

Ever seen that bank commercial where everyone shows up to the dry cleaners looking for a human to give them service, but all they have is a blender? Companies really believe (and you might too) that by automating aspects of their business they are essentially killing it.

And while we totally agree that without personal contact, constant communication and human attention your business might suffer, when we talk about automating registration we are NOT talking about cutting out completely human contact with your clients. We are just eliminating the times when there is no need for direct human contact and automating those communications.

That way you have more time to spend with clients in meaningful ways and automate the admin tasks you were previously spending hours on. Put in another way, we are talking about automating the tasks that machines can do and giving you time to do what only humans can do!

Improving what you can offer your clients through an automated system that gives them an easy and seamless experience not only improves your profits but also the experience of your customers. Improved customer experience fosters a high level of trust in your brand which will make your clients more willing to share your company with others by recommending your business. Your brand and image are what people will return for and the reason people will share their love for you with others!

PART 2: HOW AUTOMATION IMPROVES CONNECTION WITH CLIENTS

Automating your registration process pays for itself in the long run through the more meaningful relationships you build with your clients. Below are 3 reasons why.

1. Why automation will increase meaningful communication with your clients.

We've worked with tons of registrar's and the one complaint they always have is the amount of time they spend corresponding with clients and potential clients about their individual status during registration. Communication like...

- Payment reminders.
- Emailing forms back and forth.
- Asking for additional information.
- Following up on forms that are incomplete.

The list goes on and on. While you'll never be able to get away from certain kinds of people who email you about every little thing no matter how awesomely automated your system is, the majority of people respond properly when they receive clear, concise and informative emails from you about their status. And you can spend virtually no time sending these out to hundreds of people in the span of a few minutes.

By freeing up the need for sending individual emails to each and every applicant with questions, forms, follow-ups, payment reminders, etc you can spend that time instead communicating meaningfully with them.

Maybe in the past you never had time to construct a great blog post with photos and videos highlighting your last session. This is a great idea not just for marketing your program but also as a way to pump up the upcoming session for what awaits them.

You never had time before because you were too busy emailing payment due emails or calling unresponsive participants to check if they are still coming. These small things you want to do but never could before really do make a difference in the experience of your participants and will add value and excitement to your product.

Spend your free time with an automated system doing the work for you on tasks that increase real connections with your clients.

Even if you are just doing a routine follow-up about something, now you can do it on the phone and have a nice, non-business related chat to personally connect with that client. In the past, you only had time for a quick email. Sometimes that extra personal attention makes a huge difference in the experience they have with your organization.

2. Improve your customer's experience.

Providing an easy to use and professional automated system is the first glimpse into your organization that your client has. When they see a system that is smart, innovative and easy to use, their opinion of your company follows that same pattern. This company has it together. This company will most likely give me a positive experience. It may seem silly but we're all guilty of judging a book by its cover. Not to mention, a truly good looking and good functioning system will confirm these initial impressions and will most likely return as repeat clients as well as happily pass on your name to others.

And let's be real, no one likes registration. It's annoying, data driven and without a great system, time consuming for you and the user. Clients want to get registration out of the way, so giving them a way to get it out of the way that's quick, easy and involves the least time commitment on their end is going to earn you an A+ in overall user experience and satisfaction.

An automated registration will also cut down on problems users inevitably encounter during the registration process so you'll most likely have less angry / frustrated / annoyed people calling and emailing you about problems they are experiencing... because they won't have any.

Clients are coming to your site for the experience you are going to give them. Keep them on track by allowing them to move through the registration process quickly. As you are doing that you can also give them a little about what is expected for them through the system itself as a way to improve their overall experience with you before even attending your program (this will make them happy!) For example, one of our summer camp clients included photos from the previous session on each page of their registration of a kid/kids having a blast with a sentence to go with it to encourage the user to continue and get them excited for what's to come. "Just 3 more steps until John starts the best summer of his life!" and "All you have left is the payment, and then Alex will be enrolled in the best camp on the East Coast!" are just some examples.

3. Put more time and manpower into your products to make them better and more "you".

An automated system will free up some of your time you'd otherwise be spending answering status emails about whether the client paid or not, or whether their enrollment is complete, and instead use that time to focus on your product offerings.

Camps might want to spend some more time learning about or preparing for great games/programs/crafts that campers will love. A conference team might be able to spend more time preparing sessions or reaching out to vendors that aren't necessary for the conference but add more depth and variety, but in the past had no time to pursue.

The point is, there is always something else you can be doing to make your company even better than it already is! Ideally, you will spend each minute of your day as productively as possible.

However we all get bogged down in menial tasks that 'just have to get done'. Usually registration and the resulting work (emails, phone calls, etc) fall into that category.

Automating your registration won't necessarily take all the work out of registration, but it will streamline it on your end, as well as for your clients, making registration as efficient as possible for you and your team.

This will free up time for you and your staff so they can take their 'free' time and invest it in growing your organization.

PART 3: DO I NEED AN ONLINE REGISTRATION SOFTWARE?

Yes! You need an online registration software. Period!

Basically without an online registration process you are working harder, giving your clients sub-par customer service and you are netting less applicants and event attendees. Worst of all you are bringing in less money and at a slower rate. So having an online registration system that integrates into your website is a given.

When you are in the market for an online registration software it is either because your manual system you have been using for ages and ages just isn't cutting it or that your current online registration software is not doing what you need it to do. I hear these two reasons day in and day out when talking to our clients.

Here's how I usually answer the most common questions I hear from potential clients:

1. Why even choose an online solution to begin with?
Something is not working with what you're currently doing. An online solution is ALWAYS the next step.

2. Why are other organizations using an online paid software willing to spend MONEY on this solution for their organization?
In order to save money, boost your earnings and also offer top notch customer service. It basically boils down to "price" vs "cost". Is the price you are paying less than the cost of not implementing the system?

3. What do businesses go through when determining what online software solution to choose?
This answer is a little less straightforward. If we leave the organizational politics and decision making process aside and assume that a decision to move to an online process has been made, here are the 5 things to consider when making your selection:

A system with flexible pricing vs. annual contracts.

This is the biggest “thing” to look for when comparing software companies. If you’ve decided or resigned yourself to paying for a system, you should get the best deal you can for the system that is right for you.

Especially if you’re on a budget, finding software companies that offer month-to-month contracts or only charge you when your application is active can be a huge money saver.

Especially for seasonal organizations (camps, events, etc.) this payment set up totally jives with your business model.

If the company you love doesn’t offer it, try asking! Especially in this economy, businesses will usually jump at the chance to be flexible in exchange for business. And this flexibility (or lack thereof) will clue you in to their customer service and ability to provide you with individualized service and meet your needs fully in the future, both on this admin level (of money and contracts) as well as the software solutions they can and are willing to provide you.

Customer Service / Tech Support for themselves and for their applicants.

One worry people have when using another company’s software (as opposed to building their own or sticking with manual/paper registration) is tech support. Your company will never be able to fix glitches in the system without the help of the software company. So if something goes wrong, is the company available to help out immediately? In business, time is money, so technical problems can mean the loss of an applicant, and therefore loss of revenue. Finding a software company that is essentially an extension of your own office is paramount when searching for a software solution, and makes the money you spend on the software worthwhile.

Ease of Use

This is kind of a ‘duh’ point, but should be made nevertheless.

You want to find a software that is easy to use for YOU and for your applicants.

Your software solution, after all is both an application for your applicants and a back end database for you and your staff. A form building process that is quick, easy and intuitive for you to create and the applicant to complete is top of the list when evaluating a software option. Editing the forms to suit different programs you offer or as new things arise makes your registration process hassle free. Many of our clients currently are camps or other family based organizations. If you fall into this category be sure to find a solution that offers the ability to register whole families all at once. There is nothing that a parent of more than one child hates more than entering their name, address, and other common information multiple times when they are registering and paying for your program.

If you have other special sign-up configurations, finding a software to adapt to this need to make the process easy and effortless for your specific client base and for you, is important!

Working within your current website, not on a third party site.

I have talked about branding before, but it bears repeating that giving your applicants a seamless visual experience is uber-professional and keeps your business looking good, put together, and organized. Part of this is making sure that when an applicant is registering, paying and otherwise checking in with you, they are staying on your site and not being redirected somewhere else. This is helpful in many ways, first and foremost being safety and security of their information. When an applicant sees they are entering personal information and paying on your website, there is a level of trust they feel since they are dealing directly with you. Shh...we won't tell them you're using a third party software but that's the point! This feature is also important because it keeps your website at the forefront of the registration process. Once they are done, or after they've saved their application to complete later — they can click around your website, click on links to your social media profiles, share your company via Facebook or Twitter (yay! free marketing!) and beyond.

You wouldn't send your clients down the road or to another store to complete payment if you were a brick and mortar store, so why do the same online?

Flexible Reporting and Hassle Free Invoicing

While you probably won't find a software that doesn't offer a reporting function, make sure to look closely at what kind of reports they are actually offering? Also make a list of reports you regularly use or wish you could create if you had more time. Is the software capable of generating these reports easily? If they don't, can they configure the system to get you what you need?

Finding a software that allows you to manipulate reports and better yet, create your own reports with any piece of data you have to get the output you need is the way to go!

An email system built in as part of the software is SO wonderful and in my opinion, SO necessary when shopping around. Not only can this capability help you on the marketing front.
It can also greatly assist on the accounting front (read more about Email Marketing here).

The software you choose should include the ability to send invoices to your applicants. This can be as simple as an automated email setup where payments, payment reminders and other money related business is streamlined into one space.

PART 4: HOW CAN AN ONLINE REGISTRATION SYSTEM IMPROVE COMMUNICATION?

A registration software gives you the ability to individualize and customize your email communication so that every applicant gets an email with information only relevant and pertinent to them, populated with their specific status which forms they need to complete, how much money they owe and links to their individual dashboard, etc.

This improves your work flow, makes communication with your client streamlined and also more efficient and clear and saves everyone time and money!

Your first question might be, well I get that mass emails can cause confusion that ends with me responding individually to everyone, but what is the alternative other than sending an individual email to everyone in the first place?

What can I do to make my communication more effective and at the same time save me time? The answer is creating a comprehensive and individualized online registration process that allows you to incorporate effective communication techniques.

Below are some tips to make your online registration effective!

Filter

One of the most important functions of a great registration system is the power to filter your information. A filtering system saves you time by taking tons of information and synthesizing it into a manageable and understandable picture to suit your needs.

When communicating with your applicants effectively the ability to filter out specific applicants based on what you are going to send out is invaluable.

Why would you send a "payment due" email to an applicant who has completed all of their payments? Being able to send helpful and relevant emails to those who need it, while leaving out (and not confusing) those who don't, saves you tons of time in responding to all the questions your emails inevitably produce.

Spending some time initially to set up all the possible email combinations you might need to send out throughout the registration process ends up saving you time in the long run even if it doesn't seem like it at the beginning. Setting up a calendar with dates you would like certain reminder emails to go out goes a long way in organizing and managing this process. Then when that date arrives, send out a reminder to the appropriate applicants by filtering them out, choosing the right message and pressing the send button! You've just sent out relevant, meaningful and helpful information to the right applicants!

Content & Style

You should always try to keep emails and messages as simple as possible! People read emails through their phone, on their iPad and on shared computers. You don't want them getting bogged down in weird or funny graphics that might not appear on all devices or long, lengthy essays.

When your intent is to bring the applicant to action, have a clear and concise email that gives the most basic information and a link that will enable them to do the action right then and there.

You don't want them thinking "oh... this email is so long, I'll just do it later". Because the reality is, they'll never actually do it, or they will but only after more prodding and more emails and phone calls on your end.

Think of a few fun, bold and large sentences or titles, emphasizing the subject of the email that you can incorporate to help get your message across and engage the reader. Clearly mark due dates and deadlines so they jump out at the reader and include helpful and obvious links when applicable. Short, to the point, clear and simple are your friends here. A reader should be able to skim your email and get the gist that they owe this much money or this form needs to be filled out by a specific date. As a general rule, they should be able to click a link and complete the action right away.

Here is where data binding really comes in handy. Data binding is a fancy way of saying "personalize".

Being able to personalize the email as much as possible is key to getting the reader to pay attention to your message.

Start out the email saying "Hey [name]"! If the email relates to a balance due, go ahead and present the exact amount they owe! Or link them to sign in to their online application to check the balance they owe. These time saving tips will make your applicants appreciate you and will feel as though they are being taken care of personally every step of the way.

Don't spam your users!

Make sure that there is enough time in between sending out an email about something and reminding them again about the same thing. While helpful and target-specific emails are important and helpful, you also don't want to bombard your applicants with daily emails filled with reminders and deadlines. This will just overwhelm and confuse the heck out of them!

At Regpack we also do this really cool thing where we alert you, the admin, if you're about to send an email that you've sent before to that applicant(s) so you avoid sending the same email multiple times.

Sending the same thing twice, especially in a short period of time, will easily confuse and frustrate your applicants so having a built in alarm system can help avoid the problem before you have one!

Lastly, make sure your email texts are slightly different. While having a consistent voice in your email communication with applicants is important, you don't want to use the same wording in every email. This will give the impression you just copy and paste your emails and only change a few details each time.

The Personal Touch

The goal in having personalized, target specific emails to your applicants is to make them feel supported throughout the registration process and let's be honest, to make them feel special. While ineffective communication includes getting emails from every single applicant multiple times asking clarification questions, the hope is that through these reminders you won't have to chase down applicants for the things you need especially at the last minute. You will always have applicants who respond to your mass emails just to say "Thanks" or "I'll send this in today!". By taking a few seconds to respond with a simple "No problem!" or "Can't wait to meet you in a few weeks!" you are letting them know there is a real person behind the system who cares about them.

While setting up this kind of system might take a little bit of time, it in no way compares to the time you'd be wasting with an ineffective system. Coupled with passive tools like visual cues throughout the registration process and a consistent look and feel between your website and registration process, you are on track to effectively communicating with your applicants! Which saves you time and your sanity.

The goal of saving time and having a more efficient system is so that you have the time for more important and meaningful communication with your applicants and time to spend developing, improving and working on your product!

Take your automated application a step further and build an online community with your members that they can use to connect with you and with one another. Online dashboards with messaging or posting capabilities allow members to stay in touch between events as well as continue relationships made previously. Include social media features so they can connect as well as promote your events to their networks, extending your reach and visibility online!

Case Study

One of Regpack's clients, St. Helen Parish Community was in need of upgrading their registration process for their community events. Before using Regpack the Parish registration team mainly used paper applications.

Paper though meant that they had years of missed payments, confused admins and participants and just a generally chaotic registration process. They knew they were losing money because their current system did not allow them to catch non payments or paid in full status. Their admins spent way too much time trying to input all the data they received on paper applications and manually creating payment and order reports. Furthermore, they claimed half of the day was spent on communicating with clients explaining what they still have left to do in the process, updating them on their balances, or just trying to get them to send over a check. Most of this communication was on the phone which demanded them to constantly add more staff.

By selecting the online registration process that met their needs, all these problems went away. They knew they needed a process that would:

- Make sure every person is presented with the questions that apply only to them.
- Make sure the programs offered to them are correct for their age group and specific situation.
- Make sure that the system prompted them to make a payment as part of the process and send email reminders when they had an outstanding balance.
- And finally, made the creation of reports and communication as easy as clicking on a link or two with their mouse.

What is great about St. Helen Parish community is that they knew exactly what they needed to become more productive and increase their income.

Now the free time they have is used to market their programs, improve the quality of their programming and spend more time in meaningful communication and engagement with their participants. All of this of course, netted more first time clients, ensured current clients would return because of positive experiences and their programs improved because of the more time and attention to detail their staff was able to give to them.

One little change (selecting the correct online registration software) and so many improvements!!!

Do the math!

Here's a great exercise to evaluate for YOUR organization how a registration software can increase your profits...

Make a list of all of the tasks you would like to do but aren't doing because of time restraints that you believe will make a positive impact on your programs and assign a value to them. Perhaps you could offer another program (in another time slot, or for another session, whatever makes sense for your organization) but you haven't had the time or don't have the manpower to manage that. How much revenue would this bring in IF you were able to put it together and run? Now compare that to the cost of an online registration software.

How much are you paying for a support staff? Could you move someone from support to program development by switching to an automated registration software? If so, compare the costs.

While at first it seems like the price of a registration system is just another expense and not giving anything in return, the benefits in general far outweigh the price of the system, and effectively make the cost of the system much more attractive once you factor in what the efficiency of a system can offer you.

Communication is everything.

This is at the crux of how an online registration software can help your business and increase profits. It gives an all-around boost to the professional aspect of your organization. Streamlined and automated messaging and emails as well as hassle free billing and invoicing, an easy to understand and easy to use system and payment site.

Presenting a well-functioning and easy to understand process online to your applicants is professional and will help you retain more business.

Is an Online Registration Process a Method of Communication

In business, it's all about communication! You might have the best program, product or project to put out there, but if communication with your potential clients and applicants (and even your confirmed participants) is lacking, you'll lose business.

That's why having a great communication system set up between you and your applicants is key both to improving your relationship with applicants but also converting those applicants into participants.

The experience your applicants have before receiving your product (or attending your program) is often a good indicator as to what they can expect from you after the registration process is complete.

What is Communication?

While a bulk of the communication you'll have with applicants is via email, communication is not just emails. It's also phone calls, Twitter updates, Facebook posts and the online interfaces you present to your clients. Communication is any point of contact you have with your clients and as well as your product applications. This starts with the information you give on your website, the instructions you provide on your online registration system and in the visual tools you give your applicants as they go through the registration process.

It also includes your "contact" methods. How long do you take to answer emails that come through your contact page? If you have a phone number, do you answer it or return messages quickly? Even when you are not actively engaging with your applicants they are with you: through your website, your application process, or what has been written about you on the web. For instance, when your applicants are browsing your site or reading instructions, you are communicating to them what type of experience they can expect on your program. Remember that and you will know how to create a productive communication system with your applicants.

Your Brand

It is important that you give your applicants a sense of continuity and security in every aspect of their experience with your brand. From your website to the registration process to anything you might send in the mail.

It is important to make sure that you are creating an online registration system that looks and feels like your website. Applicants are already comfortable and familiar with your brand. If the registration process leads them to a generic website with no connection between your website and the application, they might lose trust and interest in you.

Sometimes you don't have the resources or time to get it looking exactly like your website. Or maybe you don't even have a website. In those cases at least make sure that you have your logo on your online registration system as a way to bridge the gap between what they are seeing online and what they will see or have seen in past marketing and communication with your company.

Visual Tools

Today, technological tools enable you to communicate with your applicants at every step throughout the registration process. If you do it right, you can create a process where the applicant feels as if there is someone sitting right next to them helping them out through the process.

For example, showing error messages when they complete a question incorrectly communicates to them that they have done something wrong and guides them how to correct it (and gets you more completed applications). Other visual tools that you can use to effectively communicate with your applicants include:

- Displaying their progress as they move through the application (like a progress bar at the top of the page).
- Providing a user dashboard where the applicant can find a list of completed and incomplete items.
- Giving a positive confirmation when they complete a section or question correctly.

Using visual tools throughout the registration process is helpful not only for the applicant but also for you. You will get more completed applications, guaranteed.

It also shows you are a real professional. Applicants will see you take your business seriously, that you put time and care into your interaction with them, and it can give them a clue what they can expect from your products in the future.

Socialize

Social media is an amazing way to communicate with your applicants by giving them the tools to communicate to others about your product.

Allowing applicants to "like" your product as they register is basically free advertising that is even more valuable since it comes with a personal recommendation from your clients! It creates a conversation between their peers in a space you wouldn't otherwise get to integrate yourself into and offers great exposure to a population you might not reach otherwise!

It also puts a "human" face behind your brand. Applicants and potential clients can passively experience who you are through your social media platforms. They can see what's going on with current projects, learn new updates from the company or find out about upcoming projects they might be interested in. Social media is thus a form of both active and passive communication that is multifaceted in terms of your ability to communicate in different and effective ways with potential clients and participants alike!

Don't overlook integrating social media tools within your registration process not just for the benefits it gives you but also as a different and fun way to allow your applicants to interact with you and your products!

Ineffective Communication

Can you communicate "ineffectively" with clients? Obviously not communicating at all is the big "d-oh!" answer. But what other kinds of communication can also be ineffective? It's important to know the difference as refining your communication is key to success!

You are communicating ineffectively if you're working too hard.

Ineffective does not mean you are not investing enough time and effort. Most often it is quite the opposite. Ineffective communication will have you on your computer and phone all day trying to answer endless questions, clarifying problems or questions with clients as they encounter them on your site.

It includes service issues with your online registration system that your ineffective communication created in the first place. What does this mean? It means that with ineffective communication you will be working harder and your applicants will be confused and unhappy. Not really a good place to be in!

Don't make your applicants work hard, ever.

Communication starts with your brand, visual tools and your social media efforts. But it is also, very importantly, a part of your registration process too!

Having a confusing, one-size-fits-all registration process makes understanding your needs difficult for applicants.

There are very few programs out there where each and every applicant needs to fill out the same forms and pay the same amount of money. Often times there are additional products or services that you are offering as well that further complicate the application process. By complicate we mean requiring a need for customization and a smooth transition from the main application to supplemental forms and payments. There are forms only some of the applicants need to fill out or are relevant only to applicants that are ordering something additional.

A one-size-fits-all registration process and application will only cause your applicants to be overwhelmed and confused by all the non-relevant options and resort to calling and/or emailing you to clarify how much they owe and what forms are necessary for what they want. This of course, is a waste of your valuable time (see the "you're working too hard" section above). You should be spending your time when talking to applicants really communicating with them in other productive ways, like communicating with potential applicants about how great your products are instead of troubleshooting and problem solving. Your application process should be smart enough to prevent that by making the process seamless and by presenting only the products your applicants are most likely to be interested in.

It should automatically add forms, questions and payments that are pertinent to them and not present those they aren't.

Making the registration process seamless is effectively communicating your needs.

A great example of a good intentioned but ineffective way to communicate with applicants is bulk emailing. Confusing bulk emails sent out to all applicants is sadly enough a common practice that should really be avoided.

It's ineffective, unprofessional, gives the applicant a sense you do not really care about him, and frankly it is too 1990's for you to be doing it. There are a lot of technological tools available today that can help you make all emails personal and to the point, i.e. effective. It might take a few more minutes to set them up and a few more to select the right people to send each variation of the message to but applicants will be informed by your emails, not confused. They will accomplish the tasks you ask of them in the emails, not call you to clarify what they need to do. And in the end, you will be saving yourself hours of work while improving your communication and saving time in the long run.

A one-size-fits-all email with tons of highlighted text, bolded sections and links to online forms will, if you are lucky, be deleted after reading the title or the first sentence (since your applicant thinks: "oh... this doesn't refer to me, I did everything right!").

For those that will actually read it, it is likely incredibly confusing since not all of the information contained in the email is applicable and relevant to them. And we all know what happens next. This is another example of where you are working hard and spending a lot of time on something and your applicants are unhappy, frustrated and confused (and probably checking out your competition for other options). You will probably get an email from almost every recipient asking for some sort of clarification as to which part of the email applies to them, double checking what they have turned in thus far or how much money they still owe. Which of course means you have to look up their file and respond accurately to them to make sure that this time around, they will "get it" and will do what they need specific to their situation. Whew, that seems like a lot of work already. Well, it is.

Keep it simple.

A good but often overlooked tip in email communication with applicants is to avoid the fun graphics, videos and pictures. These tools are great for marketing! But have you ever seen those messages on the mobile devices that block all images by default? Sending an attachment might also seems like a good idea but what happens if your applicant accesses their email through a shared computer that does not have the exact application needed to view the document?

Sending them a personalized email might not take care of these specific problems, but your applicants are more likely to keep a personalized email in their inbox until they are ready to download the right document, click on the link to their online application to fill out the uncompleted sections or click on the payment link at their convenience without having to remember mentally how much they owe.

You will see these tasks getting done quicker and accurately when a personalized email is sent.

So what's the fix?

Obviously the quick fix is not sending bulk emails out!!! We aren't saying, "don't EVER send out bulk emails" because they are great in some instances. For example, when you have a message that every applicant needs to read, having a simple function that inputs their name at the beginning of the email ("Hi John" sounds way better than "Hey!") is often all you need. But when communicating about business, meaning the applicant's status, what they owe, what is outstanding and important dates for products specific to a smaller amount of applicants than the entire group, bulk emailing needs to be put aside and a more individualized email needs to be put together.

The time it takes to set up this system is a bit of an investment. But once you put the work in and it's done, you will save tons more time in the long run when your emails are clearer, more professional and 1000 times more helpful to the reader.

Creating a template that will then personalize their name, populate their specific program dates, populate their exact payment amount and link to all the right places (their application, the payment function, their dashboard or the right form) is the only way to effectively communicate with applicants.

There are other ways, of course, to ineffectively communicate with applicants. A great test would be to follow the advice from the beginning of this book. What are you spending too much time on and not feeling like you're getting what you need back? Is there a way to change up what you're doing that nets you better results with a smaller time investment? By taking a look at your processes and how you can streamline certain areas is a great way to improve on trouble areas, not just with communication, but in all aspects of your business.

PART 5: A GUIDE TO BULK EMAILING

With so many fancy websites today, automation strategies, Facebook, Twitter, YouTube and beyond, nothing can grab your attention more than a personal email.

When you want to give a client specific information regarding their order, status or anything under the sun, a personal email is often the only way to go.

Assuming your client base consists of more than 10 clients, writing a personal email to each one is simply not a feasible option. The solution of course is sending bulk emails, but then you lose the personal touch of a personalized email and the message can and will be lost among all of their other impersonal messages (or maybe even deleted before it is opened which is NOT what you want to happen).

So, what can you do to have your message read and responded to without spending hours sending a personalized email to each client? The secret is somewhat of an oxymoron: personalized bulk emailing!

Below are some do's when it comes to bulk emailing to guide you on how to use email and still have time for other things.

Do personalize your emails.

Nothing says spam like an email that starts off with "HEY!" or "HI!" or "Dear Sir or Madam". And there's nothing people hate more than spam, I mean bulk emails, I mean...nevermind. Your clients want to see an email that was created just for them, where there is no general information that could be for anyone, instead they want ONLY information specific for them.

A personalized message gives your client the feeling that you've taken the time to personally communicate with them, that you care about them and that they are important to you.

Therefore the information contained in your message must be meant for them and them only. The result: they will actually read it and act on it, and bonus is that they feel unique and that you value them as a client! Which of course you do, but until now might not have had the time to show it.

Do communicate effectively with your clients. But how?

1. Always start the email with something like "Dear Joe" or "Hey Joe!" Even if Joe is pretty savvy and knows this is a bulk email, seeing his name will still clue him in that this message was sent to him because he was meant to receive it not because he's just on some long list of emails.

2. Make sure that the information in the email is actionable information and that it is both accurate and relevant to them. Do not send out emails to clients telling them they need to complete a stage in their application if they have already completed it. This is where an intelligent registration system comes in handy! With the ability to filter and find the registrants who have a specific outstanding payment or form, you can send a reminder email to JUST those people and not to the entire group. You can do this without a sophisticated system, however the time it would take to copy and paste every client with an outstanding payment THEN emailing them all, then responding to each one when the ask how much they owe, is just time consuming! And that's just for one "issue". What about the clients who are missing a form, who haven't sent their travel information, etc etc...you get the picture!

3. Make sure any links contained in the email work and by clicking them, the reader can easily complete the action you are asking of them.

4. Make sure the information you give the reader is up to date and accurate, including payment amounts that are due, dates, etc.

5. Always send the client to your website to complete the action so you are not overwhelmed with returned emails.

6. Make it short! People do not have time to wade through long and complicated messages. Most people treat their emails like a to-do list. Take the the Mailbox app as an example, the App Store's 2011 App of the year essentially turned your email inbox into a to-do list! Convey the basic information and a call for action. Keep all the marketing lingo for the website (you're sending them there anyway)!

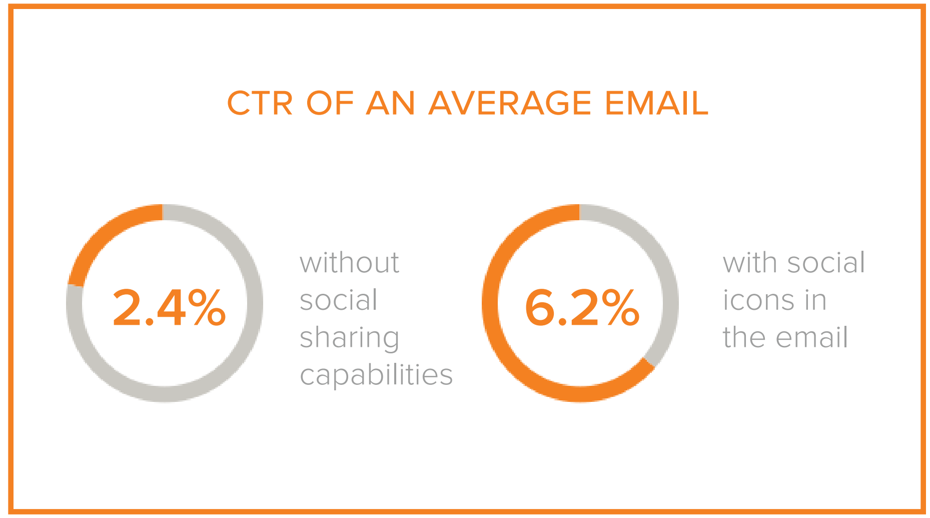
7. Put documents and information in a link if you have to. It is best to include all the information in the email, but sometimes you just have to add an attachment. Don't! Most people read their email on their phone!

Adding an attachment will just annoy them since opening attachments on a tiny screen is annoying and filling them out to send it back to you, even more so! Some of them will not be able to open it on the phone anyway, making your attachment even more useless.

If you want to include additional information either upload the document to a web server and link to it in the body of your email or better yet set up a page on your site with the information that is easily viewed and easy to act on.

8. Add social media buttons to your email. If the email is "shareable" meaning information contained has the potential to be interesting or valuable to the social networks of the recipient, allow the reader to share the contents of the post. For instance, if your email includes a registration deadline or an upcoming event, allow them to share this on Facebook, Twitter, etc. According to recent research, "the click-through rate (CTR) of an average email is 2.4% without social sharing capabilities. Add social icons in the email, and the CTR jumps to 6.2%". Personal emails to clients is 100% worth the effort since it will increase the number of early and on time payments and completed forms you receive. However creating these emails can be a time suck.

Finding a system that can personalize your communication with clients while saving you time and money is worth the effort to shop around and worth your financial investment.



Mobile-Friendly

One aspect of emailing clients that is often forgotten is that many people are now reading emails on their mobile devices. In fact, according to recent research 41% of emails in 2012 were opened on a mobile device and that percentage is expected to increase this year and in the years to come.

Therefore, writing and formatting emails that are simple and actionable is key for any user, on mobile, tablets and computers.

What not to do in bulk emails!

1. Don't style your emails with excess formatting and images.

Nothing says you've just received a bulk email more than attached images (especially ones that are just part of your signature, yuck!) or an overly styled email. These are big flashing lights that say "bulk!" and "impersonal" which amounts essentially to "Don't bother even reading me! Nothing important here!".

And yes before you even say it, we know that Apple sends overly styled emails with a million images and they are so rich and famous and amazing. But Apple probably does that because they have an enthusiastic following who will read their emails no matter what. You on the other hand, as a small or medium size business, are probably not in that position (when was the last time you had a line of people wait for you to open just because you announced a new product?). Even Google sends out simple, text only, emails that have the links you need in order to complete the action they need or want you to do. What's good for Google is most likely good for you too (except Google+ obviously!).

Add to that, as we stated above, many people read their emails on mobile devices. All of the styling and formatting that went into your nice looking email is lost on mobile and can even create wonky formatting issues for the reader, a sure ticket to delete city.

While you might always have images download to your mobile device without problems or use a certain app that doesn't create these issues, don't assume everybody else does that too. Err on the side of caution and create a simple email design that will look good across multiple platforms.

2. Don't write long emails.

Keep it simple. A greeting, the action you'd like them to perform and the link to do so. That's it! But don't forget to say thank you!

3. Don't just give information, give a call to action!

We've mentioned this point a few times already but it deserves its own section since it's so important!

When sending out a request to your clients, like to sign up for the next session, pay an outstanding balance or complete a certain form, don't bog down the email and confuse the reader with unnecessary information.

They might only read the first half of your email and if that doesn't include what they need to do and how to do it, they may never do it and you're left sending follow up emails to them with further requests which will only annoy them and still leave you empty handed and wasting time with all this unnecessary communication. You are also kind of defeating the purpose of having (and paying for) an automated communication system to do this work for you!

As part of keeping the email short and sweet, make sure the subject of the email and the text of the email focus on what is needed from them. Include an easily identifiable and clickable link to take them to the page (preferably on your website) where they can go to complete the action.

By keeping your messages straightforward, you will get the response you want. Especially if the call to action is about money. By following our tips you'll get paid faster, guaranteed.

4. Don't attach anything.

If you are emailing attached forms for clients to fill out (like say, a payment form) completing this task through your website is a much better and easier solution than an attached form that needs to be printed or filled out, resaved and then emailed (or worse, mailed) back. The recipient can click on a link within the email, add the information needed, submit it and be done.

For example, an event info sheet that exists as a page on your website (instead of an attached actual flyer in PDF form) need only be linked in your email and the user can then easily view and add your event to their calendars or forward the link to others who might be interested in attending, no matter what device they are using.

Not only are these solutions best for your clients but it all comes back to another key element of your business: driving traffic to your website. Your website is the hub of your business. It is the gateway to your social media profiles, more detailed information, photos and videos, etc. Once you get them to your site to perform an action, they might stay a while.

Perhaps they'll check out your Facebook or Twitter page since you have an easy button to press on your homepage (do you!?)

and they'll like you/follow you and interact with you, which then means your posts and updates THERE will be seen by your clients, who then might share your posts and tweets... it just keeps going on and on on from there.

In the end, what is best for your business is having your clients feel connected to you and providing an opportunity for your readers to engage with you in your spaces (Facebook, Twitter, your blog, your website, etc) as much as possible.

Choosing a Bulk Email System

This communication is what keeps them in the loop, keeps your company relevant and current for them and ultimately creates happier clients who are engaged with thoughtful and purposeful communication with you, rather than impersonal and generic bulk emailing.

There are three levels of systems available for you to choose from.

The common link between all of them is having an online database that stores your client information that the email system can then draw from.

Good Bulk Emailing Systems

A good system is one that lets you create a template email and then easily filter and sort which of your clients will receive it. These systems allow you to find the relevant people for the specific message and send it out only to them. Constant Contact and Sendblaster are great examples of "a good system".

These systems however don't offer full customization. You might find yourself writing several different template emails and still not be tailoring each message exactly to each client's needs.

For example, if your upcoming session or class have outstanding payments, don't waste everyone's time with an email to make sure they are paid in full, even if it's addressed to them personally, with a reminder to pay. This is confusing to clients that have already paid and tips them off that they are just getting a mass email intended for a smaller audience.
If you can filter out only those who are attending a specific session AND haven't paid, you are reaching your target audience effectively without wasting the time of a larger group. If you can add their balance and order in the email, even better! If you want these kinds of capabilities then "a good system" is not what you're looking for since it isn't capable of filtering the data you need and customizing the message with personal details (balance, etc).

While these “good” systems won’t break the bank, they aren’t giving you what you need to communicate effectively and efficiently to your clients. You get what you pay for, which isn’t much.

Better Bulk Emailing Systems

A “better” system is one that allows you to populate information from your database directly into an email template that you create. Which means you can have tons of email templates that will make each message that much more personal and specific to the person who receives it. This type of system allows you to make the message incredibly personalized, see the example email on the next page.

This ability coupled with filtering and sorting abilities within your database allows you to make sure only the correct clients are getting the information you need to get out and the email is tailored to their specific situation, with a unique action for them to perform within the message.

Some “better” systems that come to mind are iContact and SalesForce. While these systems are better than the first we listed, they come with either a pretty hefty price tag or a lot of configuration and syncing that you need to do (which is basically a high price tag plus lots of time wasted).

Great Bulk Emailing Systems

A “great” system allows you to filter and populate information like the level 2 system while also allowing you to view and edit the email before it goes out. This system is also capable of knowing which clients have received the email (say for a balance due) and will prevent you from sending out a duplicate email (cuts down on your emails being treated as spam!).

With this type of system, you can also add a personal note to each client while still using a pre-formatted and populated email with all the correct information set up automatically. For example, if you are sending out an email to everyone that has an open balance and you talked to Joe just a few days ago, these systems will allow you to edit the email you are sending specifically to Joe and allows you to add something like “It was great talking to you yesterday Joe”.

Choosing a Bulk Email System

New Message

Dear Calvin,

Thank you for registering Joe to our program!
Please note that you have a few outstanding items in order to complete Joe's registration

This is a list of the forms you have yet to complete:

- Health Information
- Close Your Balance of $150.00

According to our records, you have already completed the following forms:

- Medication Release Form
- Terms and Conditions

You can access the system by clicking here. You have until **May 15th** to complete the outstanding forms and to complete your balance.

Just as a reminder, the email address you used to login with is: testuser@regpacks.com. If you do not remember your password, please feel free to use the "forgot password" option on the login screen.

Best,
You

1 Personalize the email!

2 Use color to call attention to items that are complete and items that need to be completed.

3 Make sure your call to action is bold and easy to spot, including any due dates so the reader knows what they need to do and when.

4 Help the recipient out by providing their login information right in the body of the email! You want to get them completing their registration ASAP so don't make them search for their login information!

PART 6: CONCLUSION

What can you do to make your communication more effective and at the same time save time? The answer is creating a comprehensive and individualized online registration process that allows you to incorporate effective communication techniques.

Here are some tips to make your online registration effective!

While setting up this kind of system might take a little bit of time, it in no way compares to the time you'd be wasting with an ineffective system. Coupled with passive tools like visual cues throughout the registration process and a consistent look and feel between your website and registration process, you are on track to effectively communicating with your applicants!

1. Personalize your emails.
2. Communicate effectively with applicants.
3. Make your emails and communications mobile friendly.
4. Style appropriately.
5. Keep your communication short and to the point.
6. Don't just give information, provide a call to action.
7. Don't attach anything!
8. Don't work too hard!