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CREATING DYNAMIC COMMUNICATIONS WITH CONFIGURABLE JOINS

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DYNAMIC COMMUNICATIONS WITH CONFIGURABLE JOINS

Leveraging configurable joins to level up your communications

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TODAY'S AGENDA

- ▶ The 101: Content Considerations
- ▶ Dynamic Content
- ▶ Leveraging Configurable Joins
 - Dependent Subquery Outputs
 - Independent Subquery Output
- ▶ The More You Know: Key Tips

CONTENT CONSIDERATIONS

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FOUR ESSENTIAL QUESTIONS

- ▶ **What** are you trying to communicate?
- ▶ **Who** is in your audience?
- ▶ **When** will this message be received?
- ▶ **How** will you know if your message is successful?

COMPONENTS AND CONSIDERATIONS

▶ **Content:**

- Is this message the same for all recipients?
- What is each message's theme and primary call to action?

▶ **Variables:**

- What data points are used to define your audience?
- How will the message differ for audience subgroups?

DYNAMIC CONTENT: PERSONALIZATION

- ▶ No longer an enhancement—it's an *expectation*
- ▶ Considerations for defining variables:
 - How much content?
 - How many records?
 - How much complexity?

DYNAMIC CONTENT: TOOLS

- ▶ Translation Codes
- ▶ Content Blocks
- ▶ Liquid Markup
- ▶ Configurable Joins Subquery Outputs

TRANSLATION CODES

Best used for short content.

- ▶ Multiple output options per variable
- ▶ Recipient list query export must select the correct translation key and export value

Edit Translation Code

Key	program_contact
Type	String (Discrete Values)
Status	Active ▾
Value	Engineering
Export Value	rastley@rhb.com
Export Value 2	Rick Astley
Export Value 3	rastley
Export Value 4	Associate Dean for Undergraduate Programs
Export Value 5	Nagengast School of Engineering

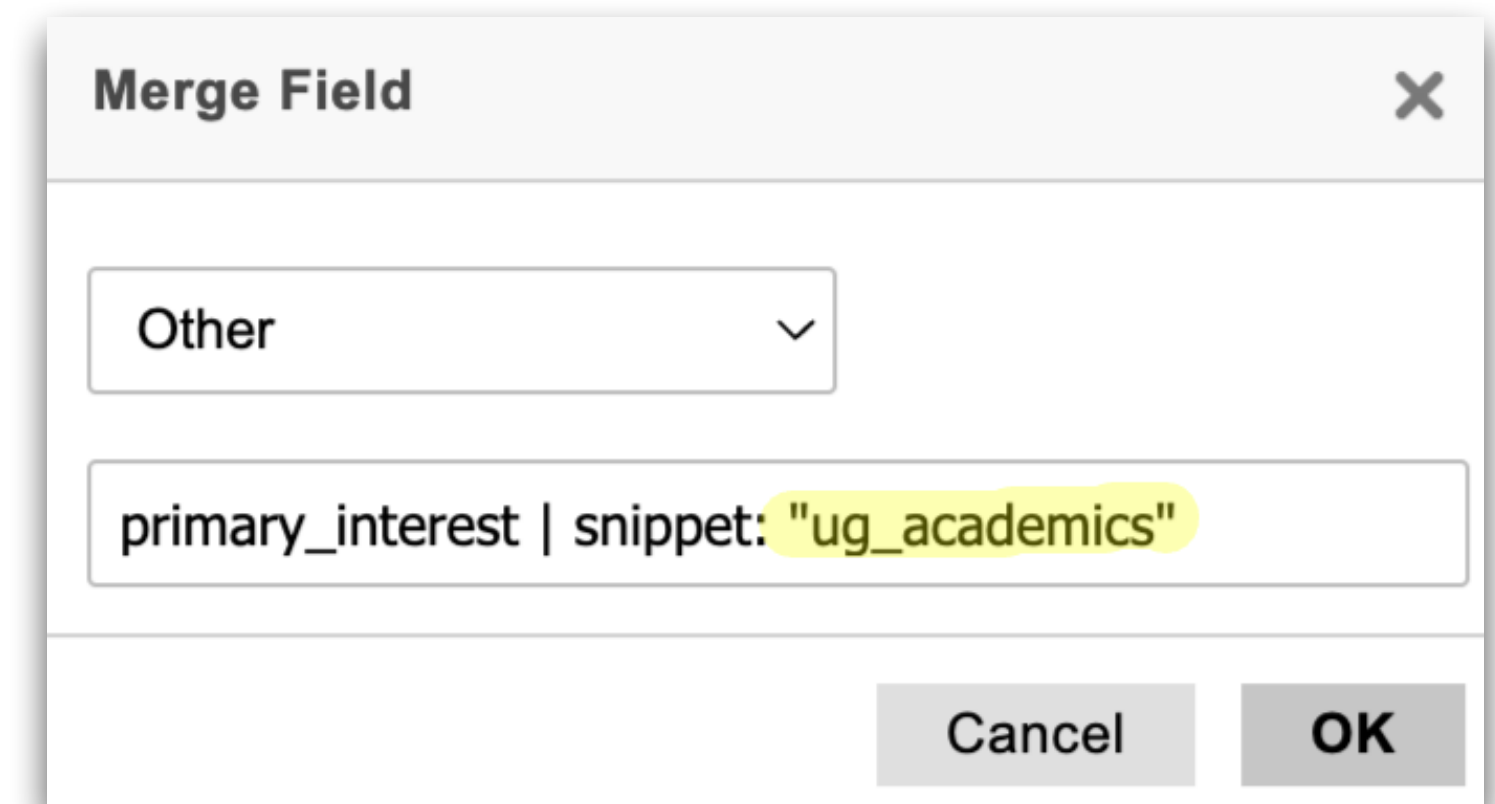
Edit Part ✕

Status	Active ▾
Name	primary_contact_division
Source	Export / Primary Undergraduate Academic Interest
Display Width	<input type="text"/> e.g, 100px or 75%
Field Width	<input type="text"/>
Export Value	Translation Code ▾
Translation Key	program_contact ▾
Translation Value	Export 5 Value ▾
Format Type	Default ▾

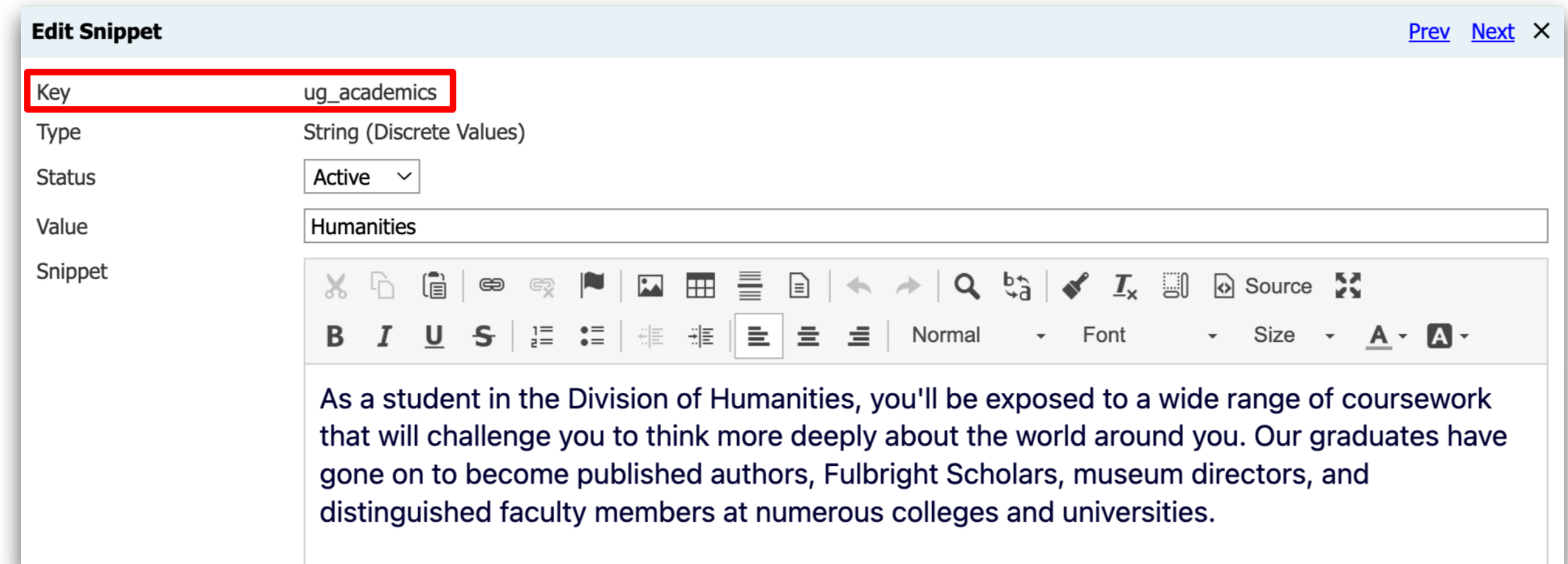
CONTENT BLOCKS

Best used for long content and styling needed in a message.

- ▶ Program-specific messaging
- ▶ Frequently-updated content



A dialog box titled "Merge Field" with a close button (X) in the top right corner. It contains a dropdown menu with "Other" selected. Below the dropdown is a text input field containing the text "primary_interest | snippet: "ug_academics"". At the bottom right, there are two buttons: "Cancel" and "OK".



An "Edit Snippet" dialog box with a close button (X) in the top right corner. It has a tabbed interface with "Prev" and "Next" buttons. The "Key" field is highlighted with a red border and contains "ug_academics". The "Type" is "String (Discrete Values)", the "Status" is "Active", and the "Value" is "Humanities". Below these fields is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, image, table, text color, background color, source, and zoom. The text area contains the following paragraph: "As a student in the Division of Humanities, you'll be exposed to a wide range of coursework that will challenge you to think more deeply about the world around you. Our graduates have gone on to become published authors, Fulbright Scholars, museum directors, and distinguished faculty members at numerous colleges and universities."

LIQUID MARKUP

Best used when content has a limited number of output possibilities and variations.

- ▶ Statement always starts with `{% and ends with %}`
- ▶ Logic: **if, elsif, else, unless**
- ▶ Close with `{% endif %}`

```
{% if {{has_deposit}} == 'N' %}  
Don't forget to submit your deposit!  
{% endif %}
```

```
If the student does not have a deposit (as defined via existence export),  
insert this statement.  
The end.
```

WHEN YOU HAVE...

USE...

Many possible outputs, but the output is fairly simple

E.g., email sender, deadlines

Translation Codes

Many possible outputs and the output is lengthy, styled and/or formatted

E.g., footers, signature blocks, paragraphs

Content Blocks

A limited number of outputs possibilities with simple content variations

E.g., showing or hiding a paragraph

Liquid Markup

LET'S DIVE INTO SLATE

EMAIL 1: Dynamic Content Blocks and Translation Codes

LEVEL UP WITH CONFIGURABLE JOINS IN EMAILS

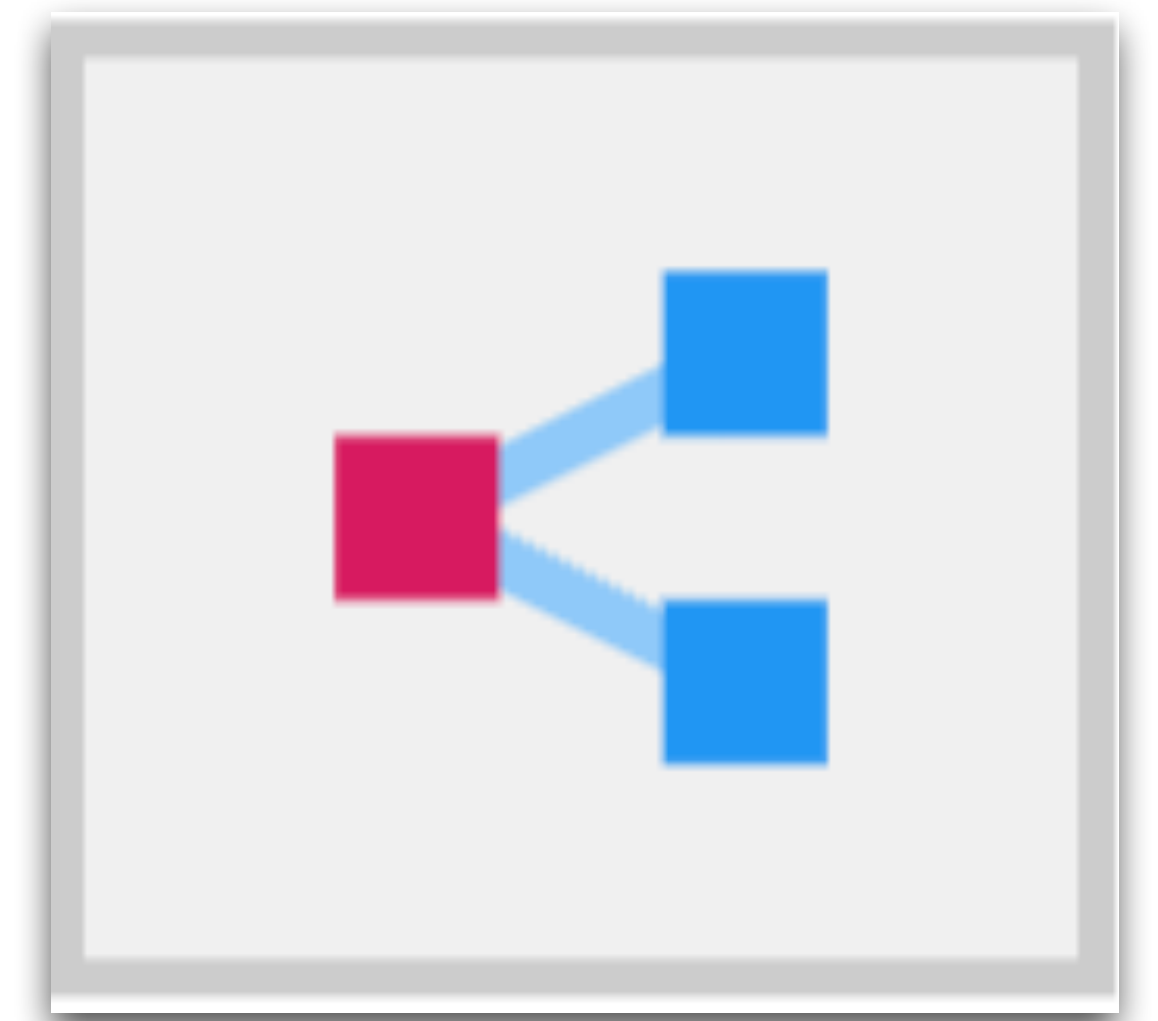
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DEPENDENT SUBQUERIES

Depend on the base of the query and use joins available from that base.

▶ **Common Export Outputs and Filters:**

- Existence
- Coalesce
- Comparison
- Concatenate
- Dictionary (Advanced)



WHEN YOU NEED TO...

USE...

Check for the presence of a value

Existence

Return the first existing value in a series of values

Coalesce

Compare a value to another data point or static value

Comparison Filter

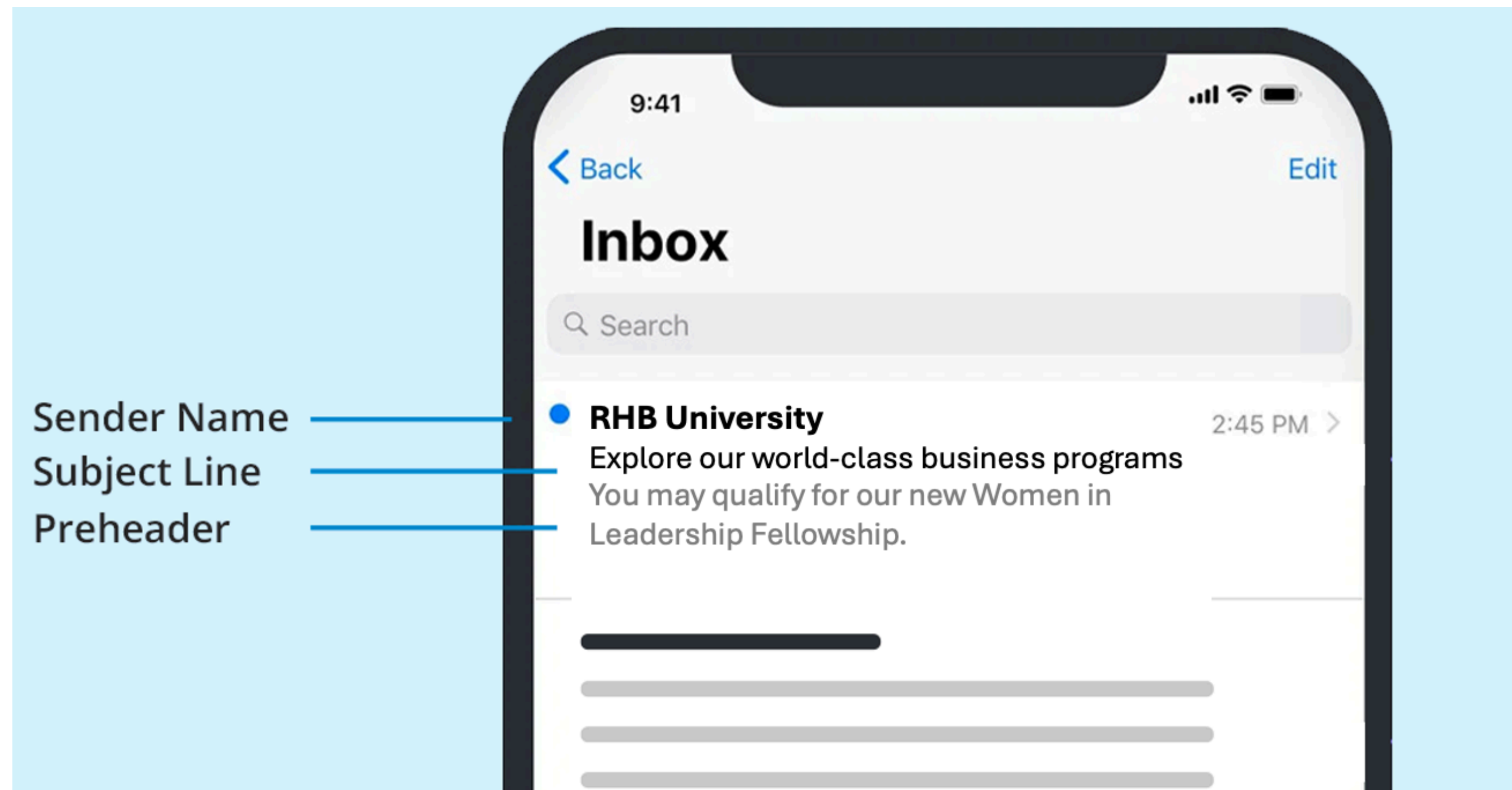
Join and format multiple values into a single expression

Concatenate

Transform data into an array for Liquid markup and looping

Dictionary

EMAIL PRE-HEADER TEXT AND SUBJECT LINES



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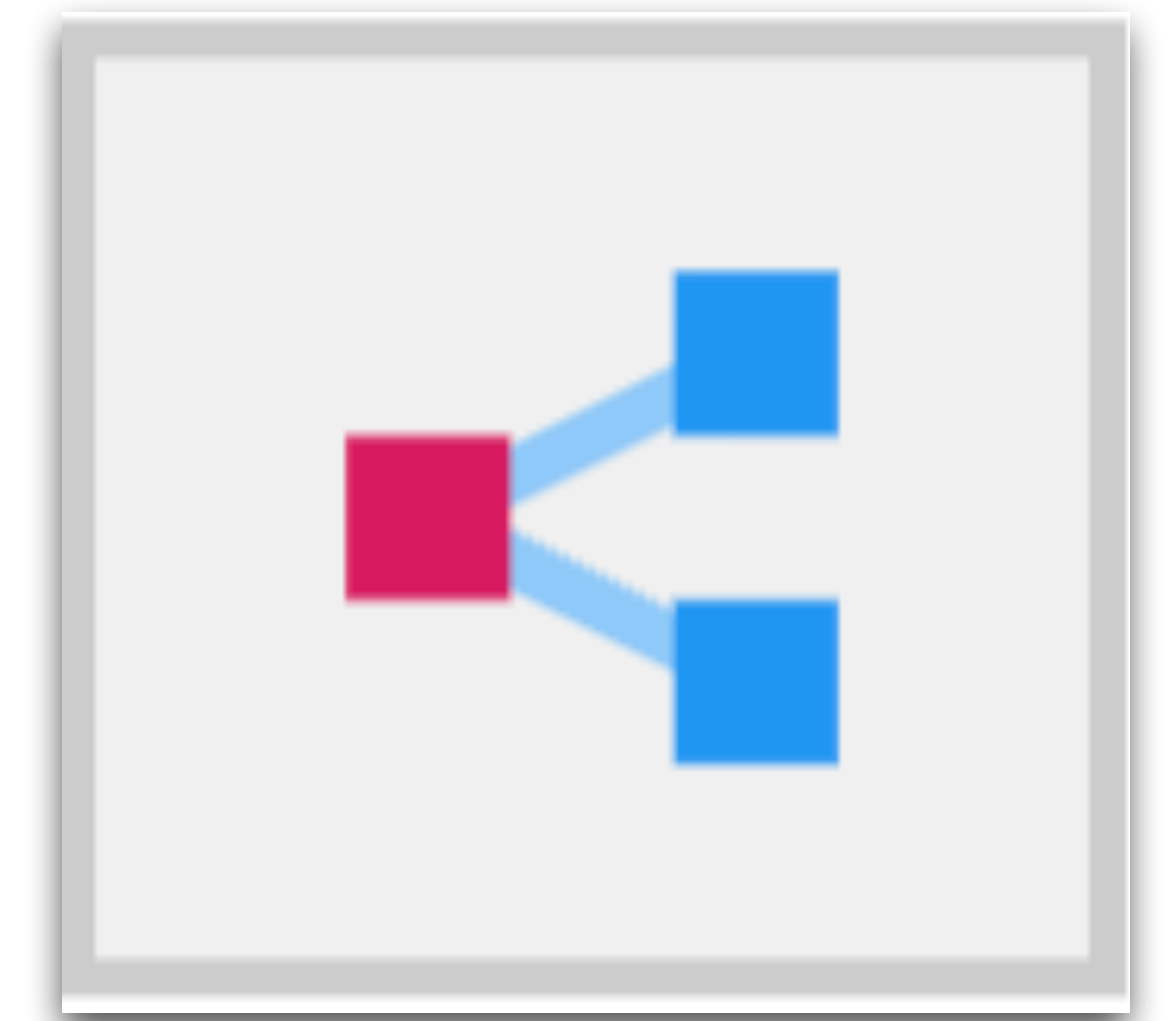
Using Dependent Subquery Exports for
Subject Lines, Pre-Header Text and Program Deadlines

INDEPENDENT SUBQUERIES

Get to data independent of the recipient list query base.

► **Common Use Cases:**

- Reference Form or Event data for which there is no form response
- Reference Datasets
E.g., Programs, Alumni, Academic Calendar, Employers



LET'S DIVE INTO SLATE

Independent Subquery Examples and Liquid Looping

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KEY TIPS FOR OPTIMIZING MESSAGES

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KEEP IN MIND...

- ▶ **Mobile First** vs. Mobile-Responsive
- ▶ Email design and Microsoft Outlook
- ▶ Words of Caution:
 - Beware of ampersands
 - Limitations of string-based filters

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THANK YOU

**Please join us tonight
for our RHB Party**

5:30 - 7:00 PM

THE GWEN HOTEL ROOFTOP