



Nov. 4, 2022 | IFG Board meeting

I. SharpSpring strategy [update]

Executive summary: In June 2022, we shared with you the switch to SharpSpring, a robust Customer Relationship Management (CRM) marketing platform. SharpSpring helps amplify the IFG's member engagement efforts. Beyond the basic components an email service provider offers, each of SharpSpring's advanced features enables IFG to fully understand and engage with MDA members throughout their journey and provides the ability to integrate powerful marketing automation. IFG will be able to create and identify highly interested leads, nurture their engagement, and convert leads.



Update: IFG completely migrated to the SharpSpring platform in August.

A. Advantages over the previous Mailchimp platform:

- 1. Cost:** FREE via James & Matthews relationship. At its conclusion, IFG paid Mailchimp \$640/month (\$7,680/year) for our tier of 40,000 contacts. This cost is eliminated using SharpSpring. Further, the retail value of SharpSpring is \$15,000 to \$20,000/year, which came free to IFG.
- 2. Unlimited contacts:** We can onboard as many contacts as we want including the State Bar of Michigan's 18K+ contacts; no tiered contact system as in Mailchimp.
- 3. Powerful marketing tools** to assist with better conversion rates; helps us manage our efforts and identify ROI.

B. Key applications/opportunities for IFG using SharpSpring:

- 1. Emails** including Check-Up eNews, Member eConnect; webinars, seminars, and continuing education (CE) opportunities; insurance-related communication; special promos and product offers.
- 2. Landing page and analytics** to measure where leads are coming from (e.g., articles from QR codes, emails, social media, direct mail, etc.), including integration with forms to measure calls to action (CTA).
- 3. Lead nurturing** to target mailings to members more succinctly; segmenting messaging based on their interests. Each member has a profile that will show us what they have opened, and what products/services they have shown interest in.
- 4. Visual workflows** that can more deeply integrate MDA Insurance & MDA Services into the new member recruitment and onboarding processes to share pertinent information with members at the appropriate time in their life cycles.

