Open Source's Best Kept Secret

Marketing Automation with Mautic

Ruth Cheesley - Mautic Project Lead



Ruth Cheesley

Mautic Project Lead @ Acquia

18+ years using and contributing to open source projects (mostly Joomla! but don't hold that against me!)

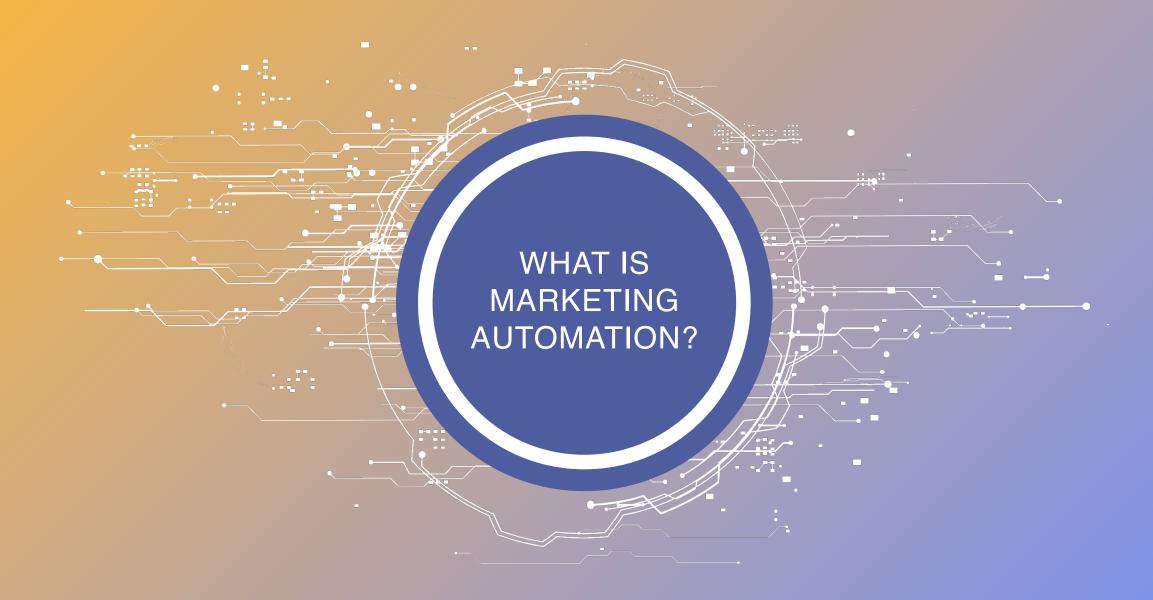
Located in Ipswich, UK

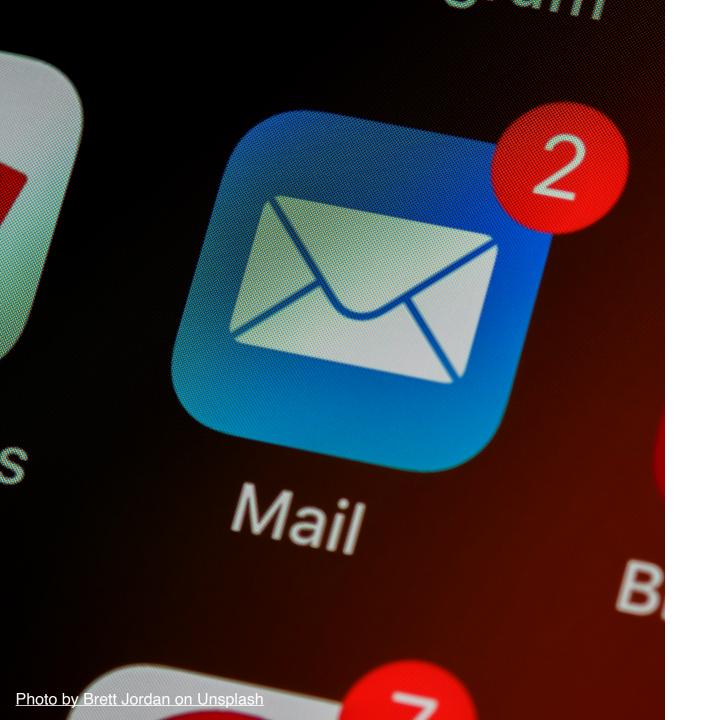
Working full time supported by Acquia as Project Lead for Mautic.





- What is Marketing Automation? What is Mautic? What does it do? How does it work?
- Why are Mautic + Drupal the perfect
 combination for growing organisations
 and agencies
- Getting started with Mautic
- How Drupalists can contribute to the Mautic project and community





Traditional Email Marketing Is Single Channel Focused

- Tracking email and link engagement
- No knowledge of activities on other channels
- Limited ability to track and nurture the journey of a contact through the buying cycle
- Simplistic personalisation of emails (first name),
 basic automation features



Question? - Ruth, I'm looking to learn about your customer feedback process, but instead of I c Manning 2 ertification B. Project Management Certification Boot Camp - The course will help you become a better pro g Python for. 3 Days Live Training on Data Analysis using Python - In This Course we will discuss on Data Ruth Cheesley - Would you like to work in Dubai, UAE ? - Dubai Job Opportunities For Ruth C Bayani 2 Days Live Training on Statistics for Data Science & Machine Learning - This course is mea cs for Data. Training on. 3 Days Live Virtual Training on Tableau certification - You'll learn all of the features in Tablea Greetings dear. Nice to meet you, my name is Nashwa, I would love to get in touch with you a azhari iness Monthly How to use connectivity to and drive efficiency - Connectivity is paramount to efficient work ertified Solut. AWS Solutions Architect - Associate (SAA-C02) Certification Training - The AWS Certified 5 n Gorry great deal, Ruth - Hi Ruth - I understand that you might be extremely busy, but did you manac Master Data Analysis and Visualization in Microsoft Power BI - The instructor will begin by a nalysis and V. Ruth Cheesley - Would you like to work in Dubai, UAE ? - Dubai Job Opportunities For Ruth C Bayani g Python for. 3 Days Live Training on Data Analysis using Python - In This Course we will discuss on Data Register Your Interest; Be the first to receive a 2022 Sponsorship Media Pack - Good Aftern erard Phillips Big Data Analytics -Final Chance to Showcase Your Solutions - Good Morning, I hope this en 3 Days Live Virtual Training on Data Science and Machine Learning with Python - You will le for Data Sci. iness Did you see how you can save on security with 02? - In this hybrid working era, getting the ri Connect with Decision-makers in retail and investment banking sectors - Verified contact de Vallace est and Practi. 4-Hours Live Virtual Training on PMP Test and Practice Questions Review - PMP certification ables in Exc. 3 Hour Live Training on Microsoft Excel Pivot Tables - In this three-hour class you'll discover eals professional in making rubber seal parts. - Dear Sir or Madam, Hope everything goes well wi aining on Mi. 6 Hour Live Training on Microsoft Power BI Desktop - update a running with Power BI and le n@lead-zoom.co.... quick call, Ruth - Hi Ruth, I sent you an email a few days ago to discuss how we can help you a West Events with a Live Edge - Hi Ruth, I dropped you a note recently about how Outlook can help lazzard Prospecting and Lead Generation with Email - Hi Ruth Companies of all sizes are using email Health Information on symptoms and transmission - COVID-19: Information on symptoms and trans

3 Hour Live Training on Microsoft Excel Pivot Tables - In this three-hour class you'll discover ITIL® 4 Foundation Certification Training (Include Exam Voucher) - The ITIL 4 Foundation co

3-hour Live Virtual Training on Microsoft Excel from Beginner to Advanced - This course wil

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Traditional Email Marketing Often Lands In The Spam Box Because:

- One message sent to all little customisation;
- Feels like 'being sold something' (which may not be relevant to you);
- Does not consider the contact's position in their journey with the brand;
- Message is often inappropriate or not of interest to the recipient => Spam!

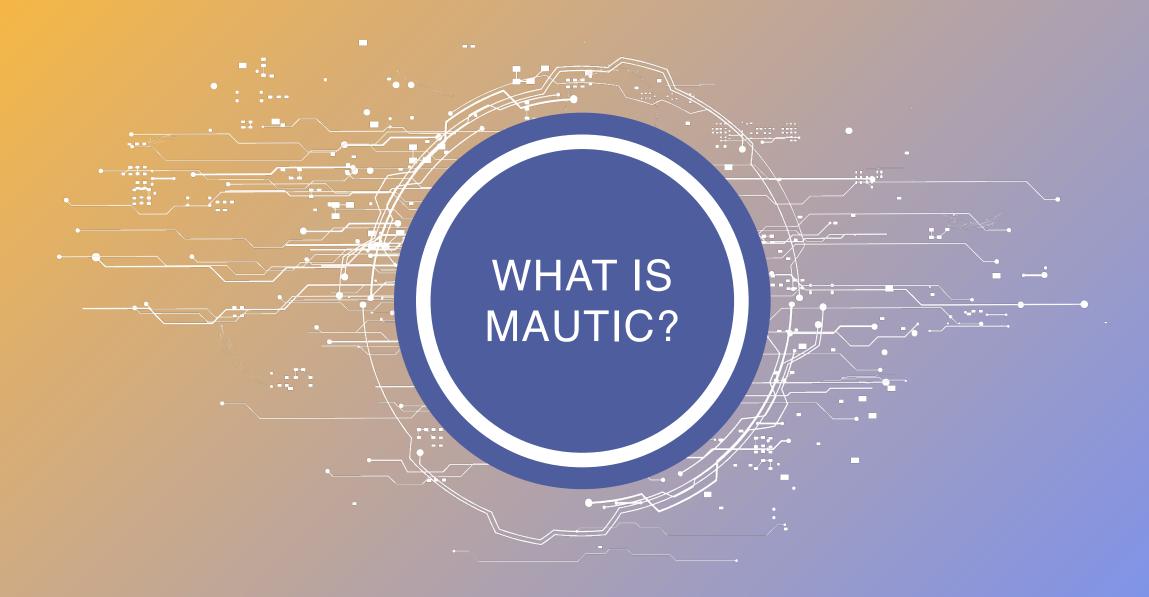




Marketing Automation Requires A Combination Of Software And Strategy

- Enables nurturing of prospects with highly personalised, useful content which helps convert them into customers
- Places the customer at the centre of everything and focused on developing a trusted relationship
- Reduces points of friction in the customer journey
- Does not end when the sale is made!







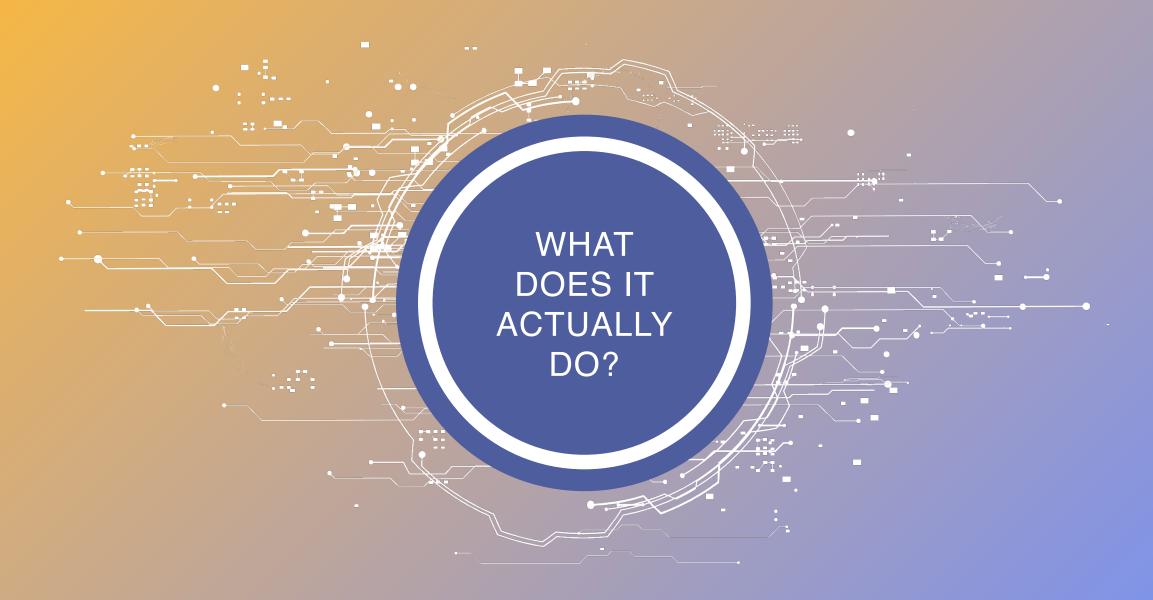
A Fully Featured, Open Source Marketing Automation Platform

- GPL v3 and similar stack to Drupal -Symfony 4, Composer support
- Supported by a young but growing community
- We welcome new contributors!





Our vision is to be the ultimate fully featured and scalable marketing automation layer that can stand alone or be dropped into any existing tech stack, enabling organisations to seamlessly deliver an integrated, personalised digital experience that delights marketers and customers alike.





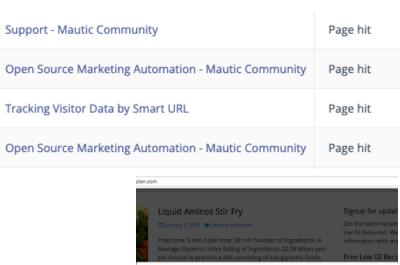
Mautic Solves Critical Digital Marketing Problems

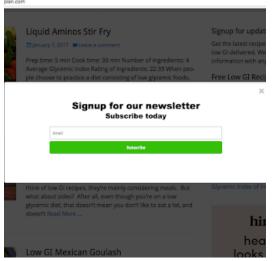
- Everything about the customer in one place
- Send personalised transactional and marketing communications through multiple channels
- Interact consistently across multiple channels based on their profile and behaviour

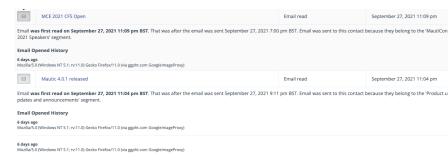


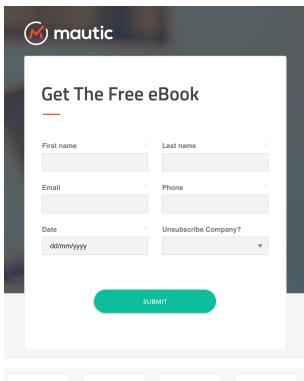
Mautic Enables You To Capture Visitor And Customer Insights With:

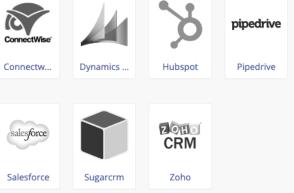
- Website/app tracking;
- Interaction tracking (open, click, reply);
- Data capture (forms);
- Call to action prompts;
- Third party integration (CRM, ePOS etc).











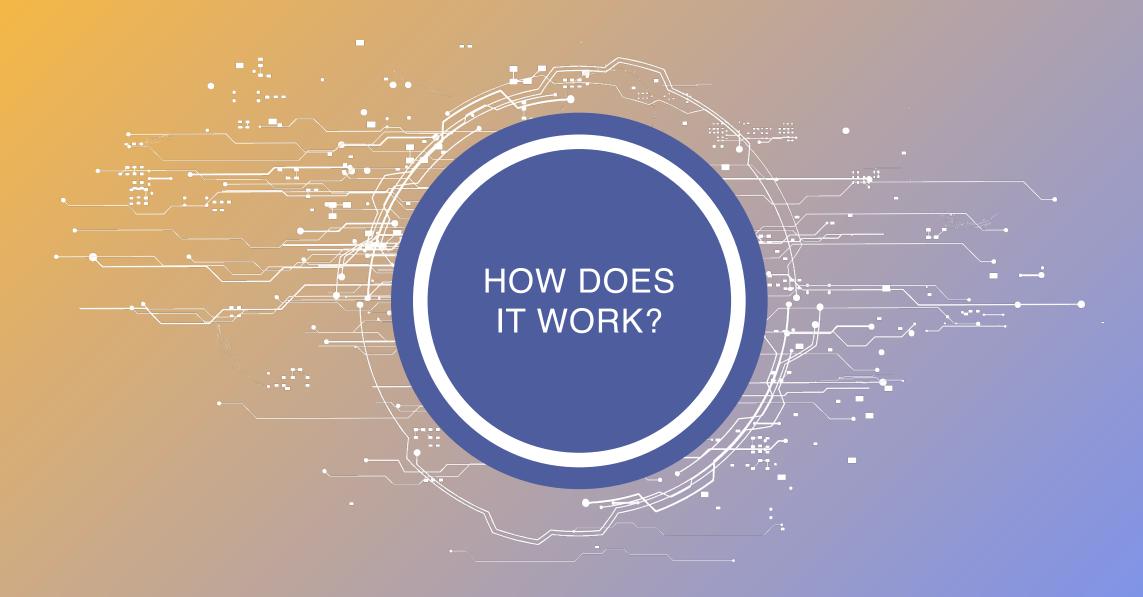




Mautic Enables Truly Effective Multi-Channel Marketing

- Create fully configurable campaign workflows across multiple channels including:
 - Email;
 - SMS;
 - Browser notification;
 - Push notification;
 - Web-based popups, bars and modals;
 - Your custom integrations!







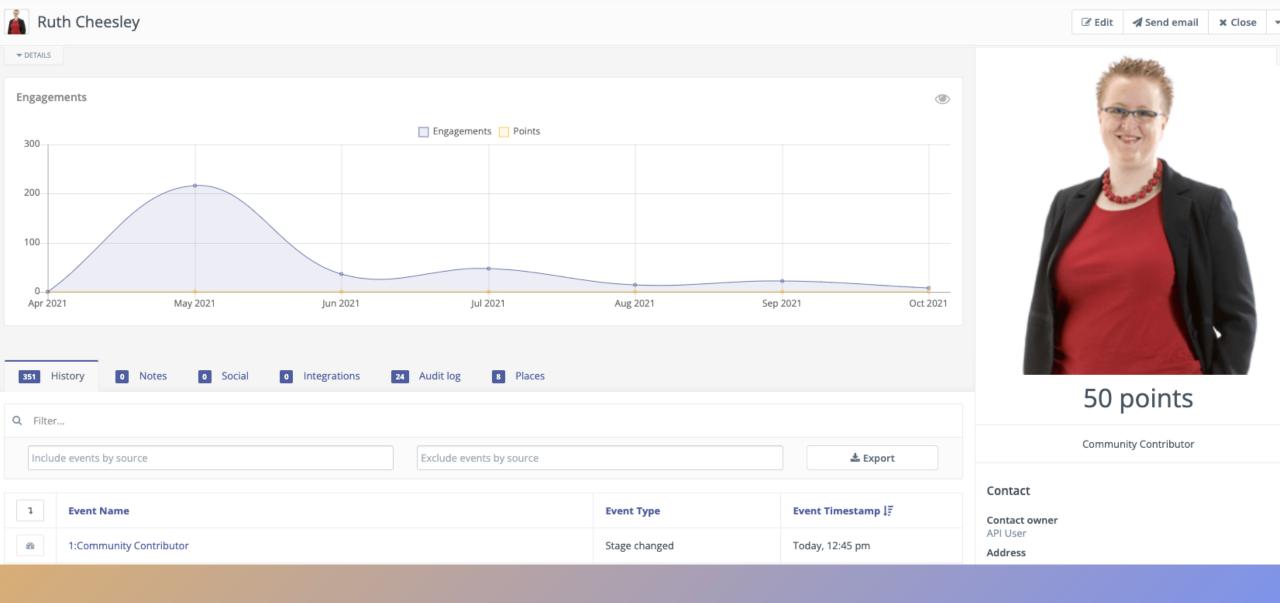
Mautic Builds A Profile For Visitors And Known Contacts

 JS script embedded through Drupal plugin or directly on the page (integrates with cookie tools)



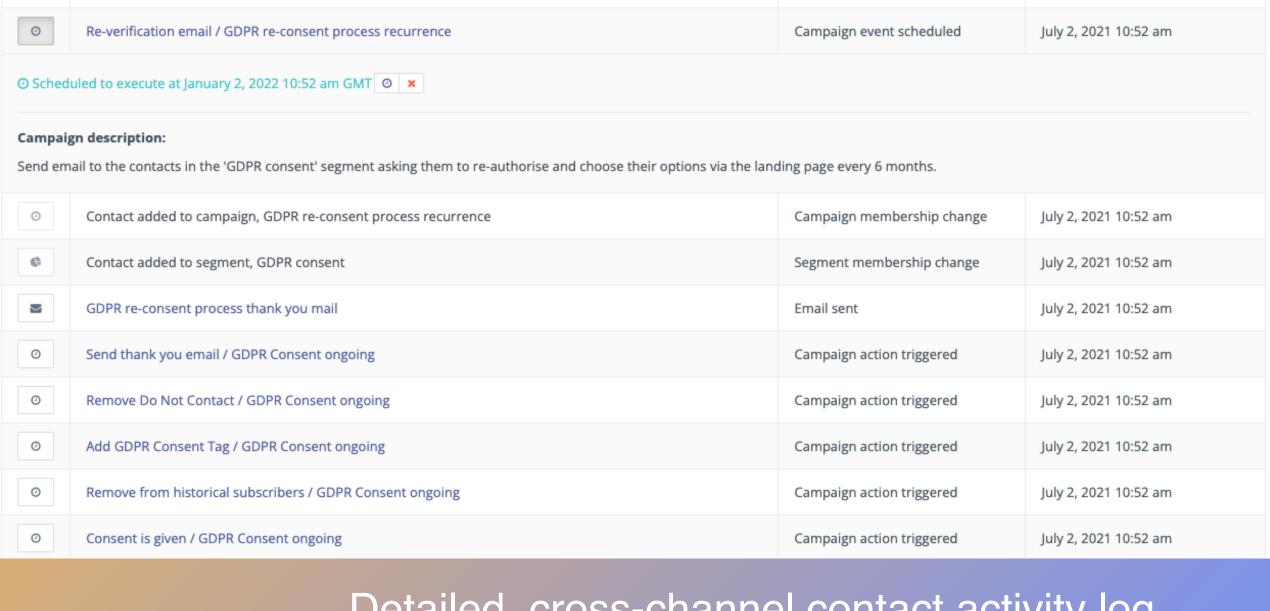
- Build a profile of a visitor's activity across all channels
- Synchronise the profile with other tools in your tech stack





A centralised customer profile





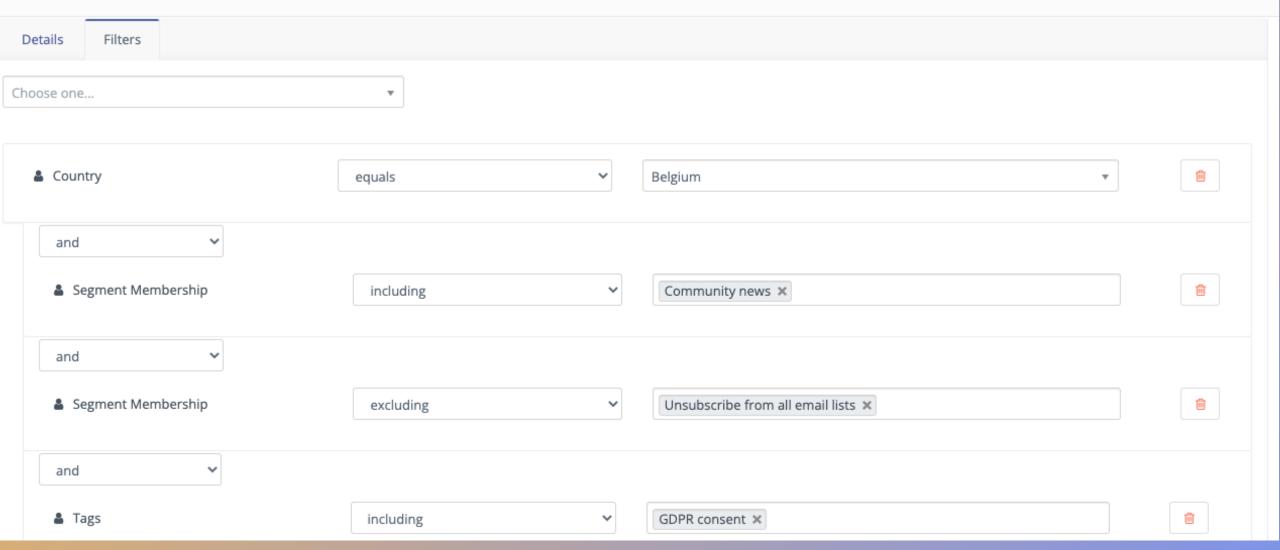
Detailed, cross-channel contact activity log including scheduled communications @RCheesley



Mautic Allows You Complete Control Over **Segmenting Contacts**

- Simple query builder with and/or options
- Use fields, segment membership, stages, points and more to segment your contacts
- Build segments at regular time intervals (powered by cron jobs)

Edit Segment - Community news in Belgium



Easy to configure





Mautic Provides An Intuitive Drag-And-Drop Journey Builder

- Click to select, drag to move, clean user interface
- Enables building a campaign journey using decisions, actions and conditions
- Affirmative and negative paths to fully build out your campaign workflows

Building a Campaign

Decision

?

A decision is made when a contact takes action or not

- Device, brand or OS used
- Downloads an asset
- Requests dynamic content
- Submits a form
- Visits a page
- Opens email
- Clicks on email
- Replies to email

Action

?

An action is something executed in Mautic

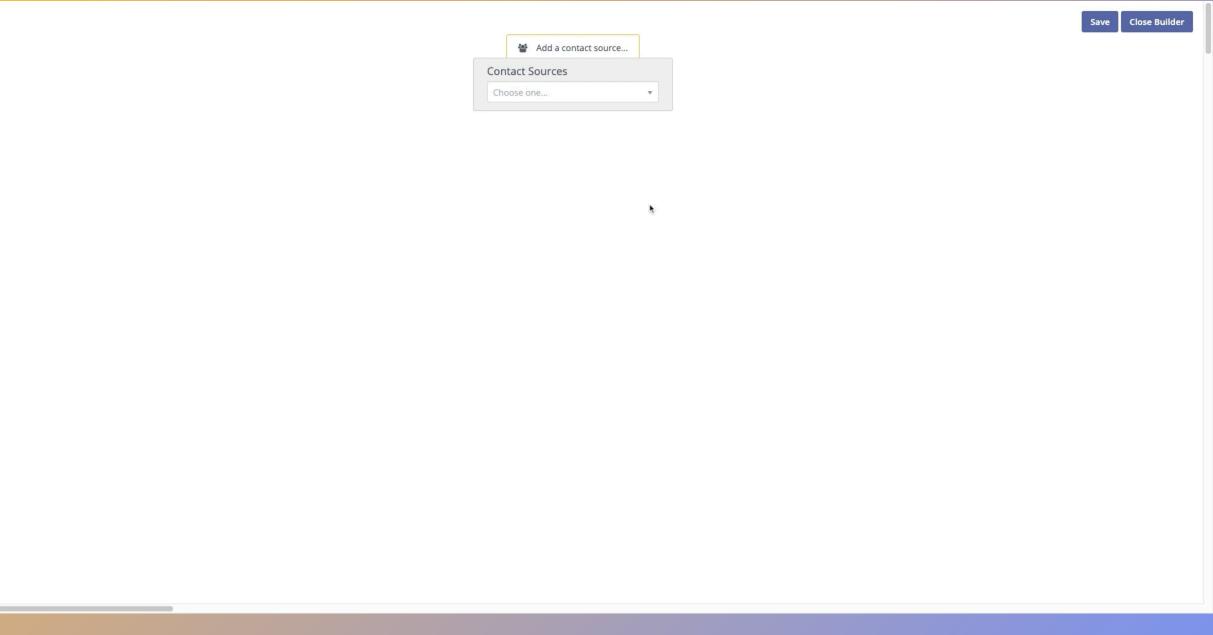
- Send Email
- Send SMS
- Adjust company/contact score
- Add Do Not Contact
- Remove from Campaign
- Change Campaign
- Send Webhook
- Update contact/company
- etc....

Condition

?

A condition is based on known profile field values or submitted form data

- Are in/not in specified campaigns or segments
- Used a specific device, brand or OS
- Value on contact profile
- Owner of contact
- Contact tags
- Form field value
- Has an active notification
- Had a valid email address



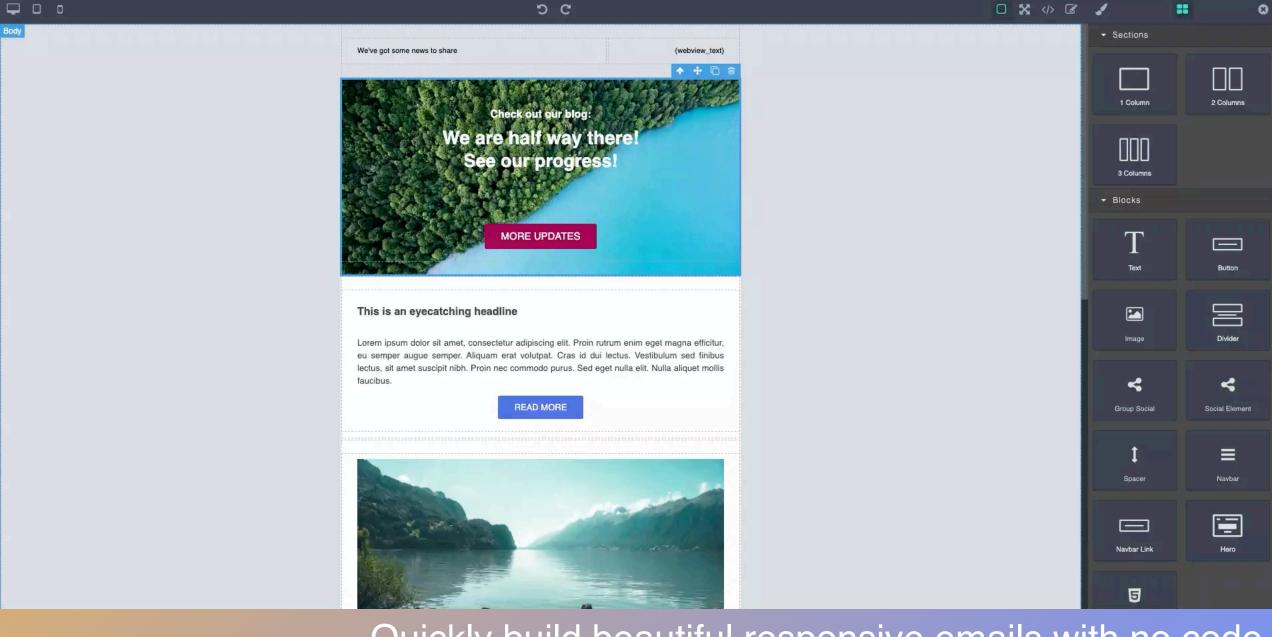




Mautic Enables Creation Of Beautiful Emails And Landing Pages

- Open source framework GrapesJS
- MJML-based fully responsive email themes
- Drag-and-drop, fully configurable interface
- Fully customisable add your own components and blocks, style to your own requirements



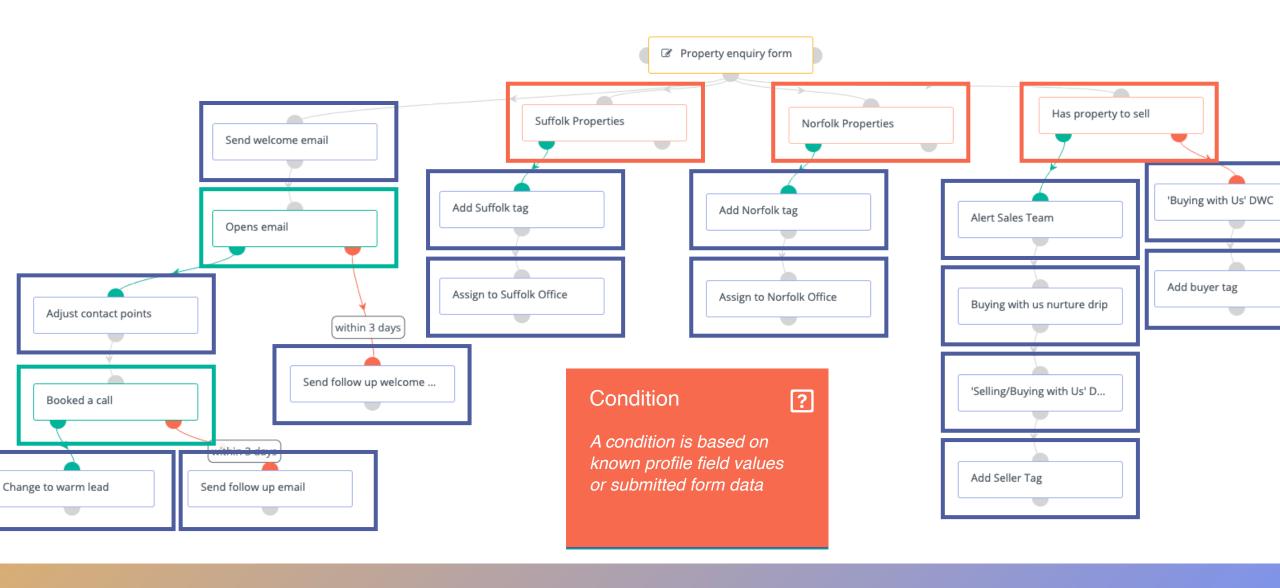


Quickly build beautiful responsive emails with no code required (but code mode is available)

@RCheesley



Worked Example: Estate **Agents Using Mautic**



Intuitive drag-and-drop campaign journey builder



Top of the Funnel

Understanding what the visitor is looking for. Awareness Segment by location, requirements and budget. Focus on getting viewings: Filling of enquiry forms. Interest Use points/stages to move through the process

- Goal: Capture information and arrange a viewing
- Property-specific and intent identification landing pages
- Advertising campaign landing pages
- Tracking of referral source, interactions and engagement
- Segment and score based on behaviour / activity
- Show relevant / appropriate CTA's, send relevant properties / opportunities









932 Dolor Street, NY 72008

- 6 bedrooms and 5 bathroom.
- Garage available for 3 cars.
- Gas heat and fireplace available.

\$1,500,000

More



932 Dolor Street, NY 72008

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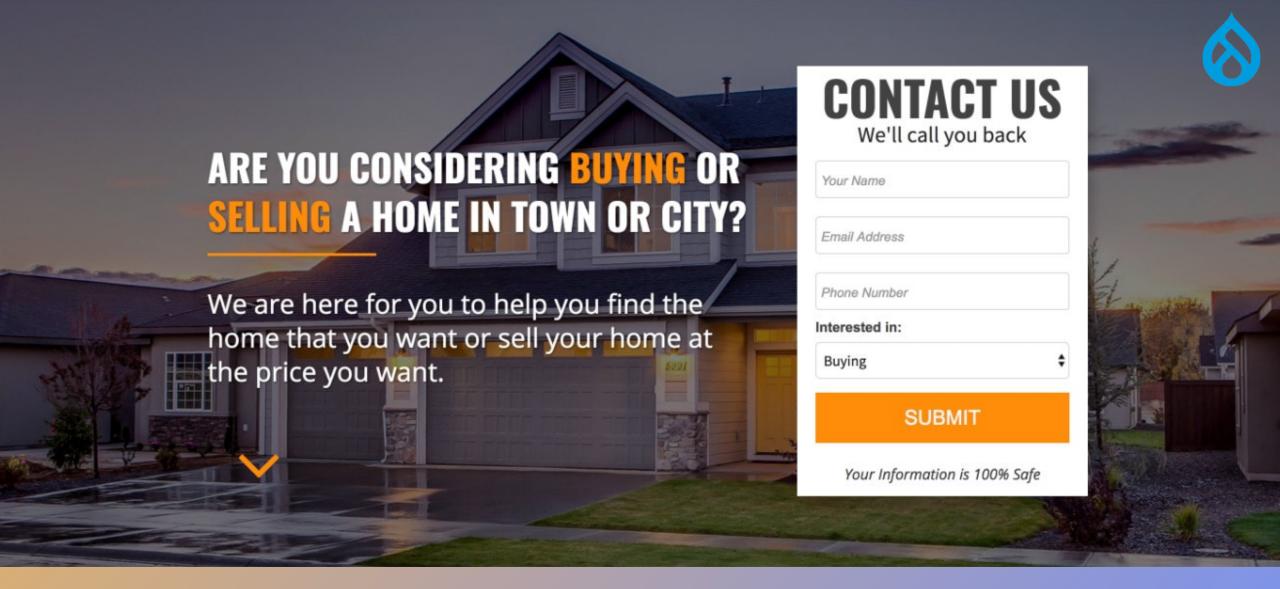
932 Dolor Street, NY 72008

- 6 bedrooms and 5 bathroom.
- Garage available for 3 cars.

Surface Properties That Match Their Requirements

- Dynamic content on website and email feature properties which match their profile
- "If in (or not in) this segment, show this content"
- Integrate with existing tools to pull in filtered information





Landing page designed to determine intent, and identify the anonymous visitor

@RCheesley

Arrange a virtual or live viewing Use this form to request specific information about this property or to arrange a viewing NAME REQUEST FURTHER INFORMATION ABOUT THIS PROPERTY PHONE EMAIL DATE TIME I want to request a virtual viewing I have a property to sell Please tick this box if you are happy for us to contact you via phone and email. You can view our full privacy policy on our website. SEND ENQUIRY

Show That You Understand The Customer

- Virtual or live viewing options
- Opportunity to ask questions
- Further opportunity to understand intent
- Explicitly gaining consent for this purpose



Middle of the Funnel (MOFU)

Qualification



Deepening the customer profile to determine financial viability and readiness to proceed. Building trust in the brand and developing relationships.

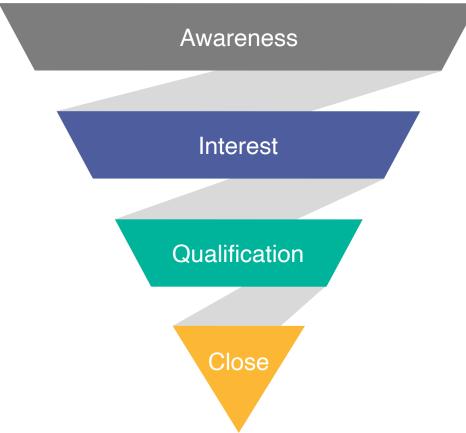
- Goal: Prioritise customers by likelihood to complete
- Progressive profiling to gather more information on customer



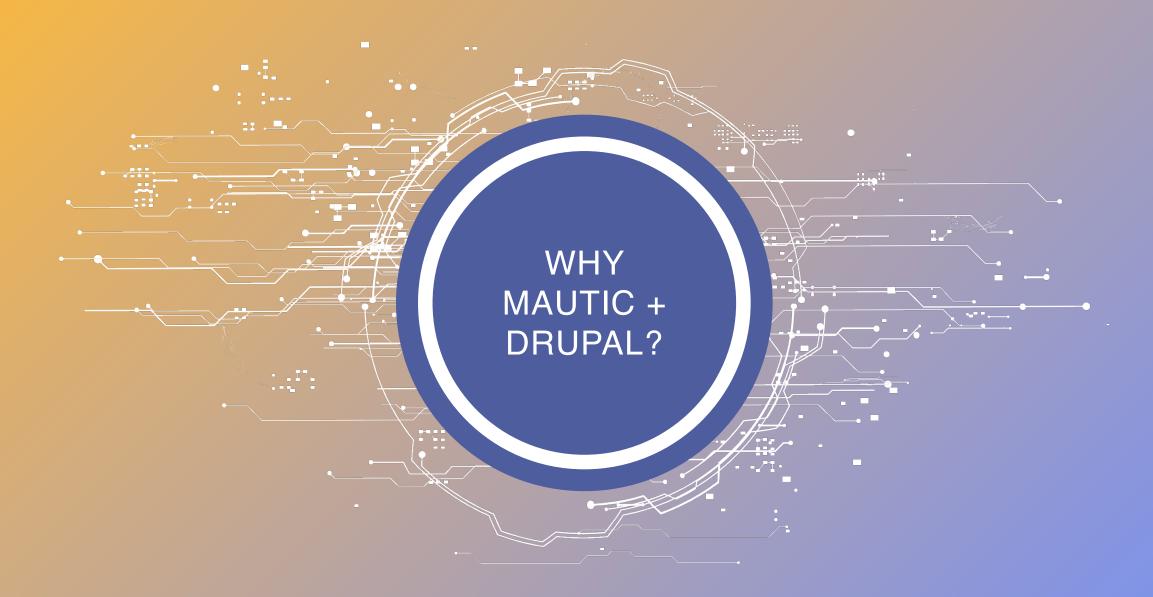
- Use points to prioritise customers based on readiness to convert
- Assign high-worth customers to specific team or individual
- Focus strongly on trust and nurturing confidence in the brand "why would I go anywhere else?"



Bottom of the Funnel (BOFU)



- Goal: Close the deal and delight the customer
- Opportunity to cross sell services (e.g. mortgage application, life insurance, removals services)
- Set expectations post-close (e.g. process for picking up keys, day before reminder checklist)
- Provide useful resources (eg refuse collection dates, local authority contact, council tax forms)
- Thank the customer for trusting you (tie in with a gift on move in day)
- Customer satisfaction surveys / reviews



Mautic + Drupal





Same open source license as Drupal - GPL v3.

SYMFONY



Symfony-based, developers can adopt easily.





Own your own data, freedom to extend and grow.





Full integration with Drupal sites and applications.





Digital Experience is an exploding sector for growth.





A worldwide community of open source contributors.



Self-Hosting



Mautic Community Partners

 Contribute financially to support Mautic, AND







 Actively contribute on a consistent basis within the community across our monitored channels.







mau.tc/partners



Getting started with Mautic



- mautic.org/download
- github.com/mautic/ recommended-project
- github.com/mautic/mautic
- hub.docker.com/r/mautic/ mautic

Install

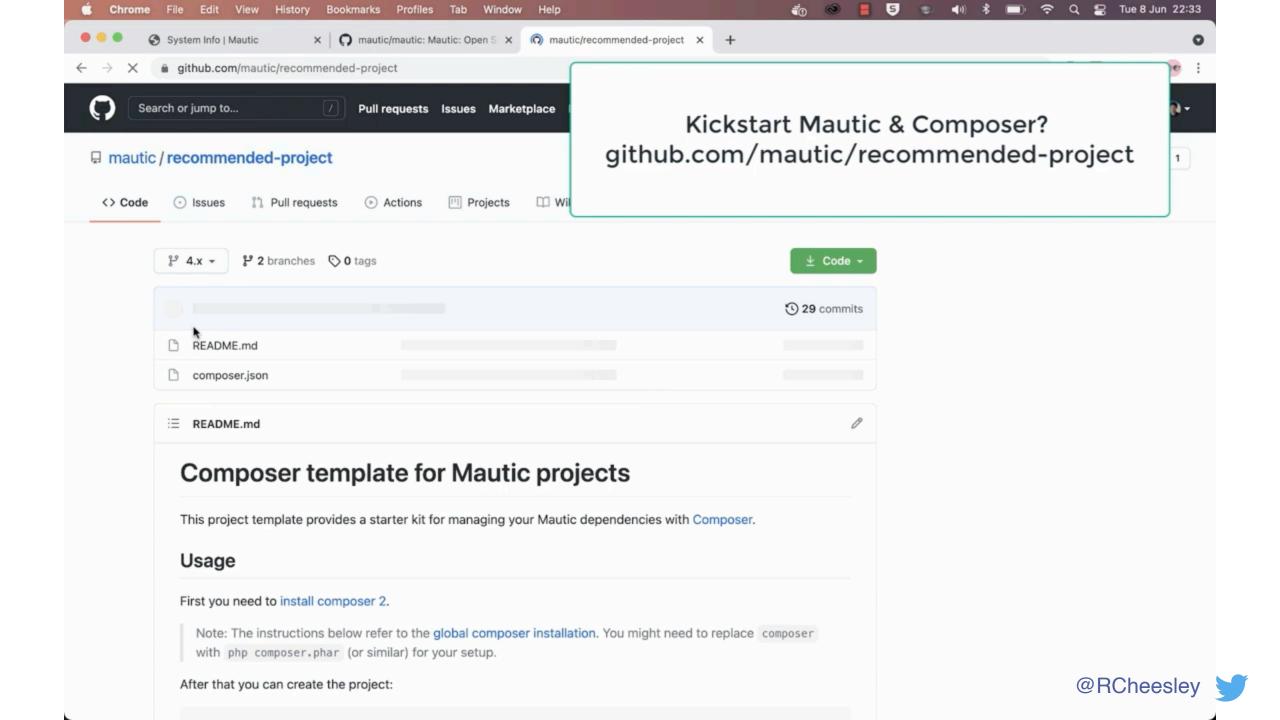
- GUI-based installer
- Command line installer
- Composer-based installer
- DDEV native support
- Gitpod support

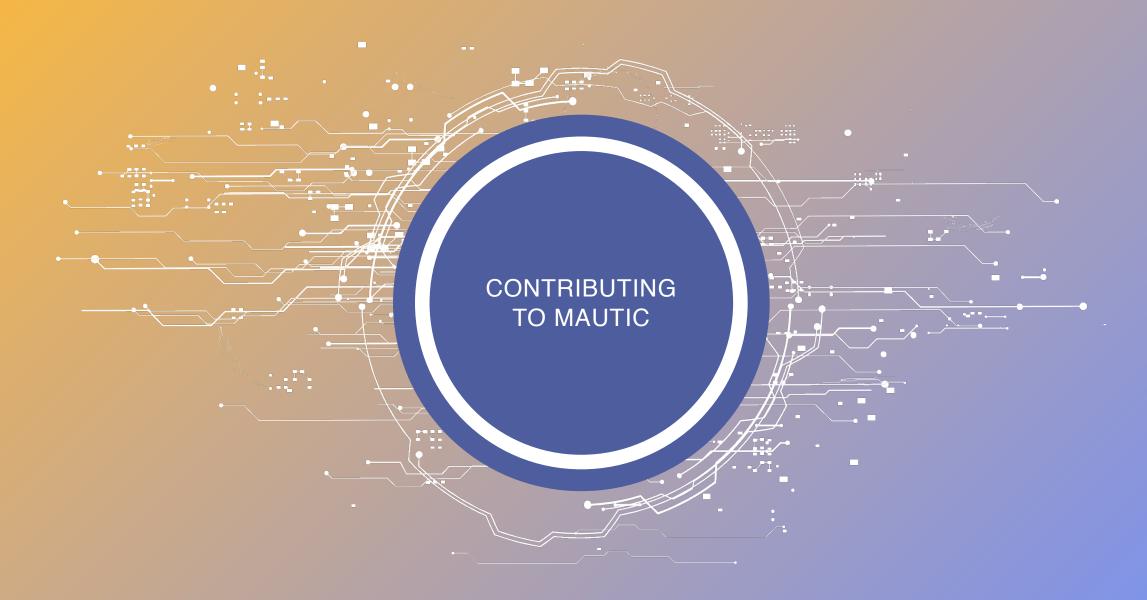
Configure

- Set up email transport, tracking preferences etc
- Set up cron jobs (required)

Integrate

- Install Drupal tracking module <u>d.org/project/mautic</u>
- Install any other modules you might need
- Configure any integrations required (e.g. CRMs)



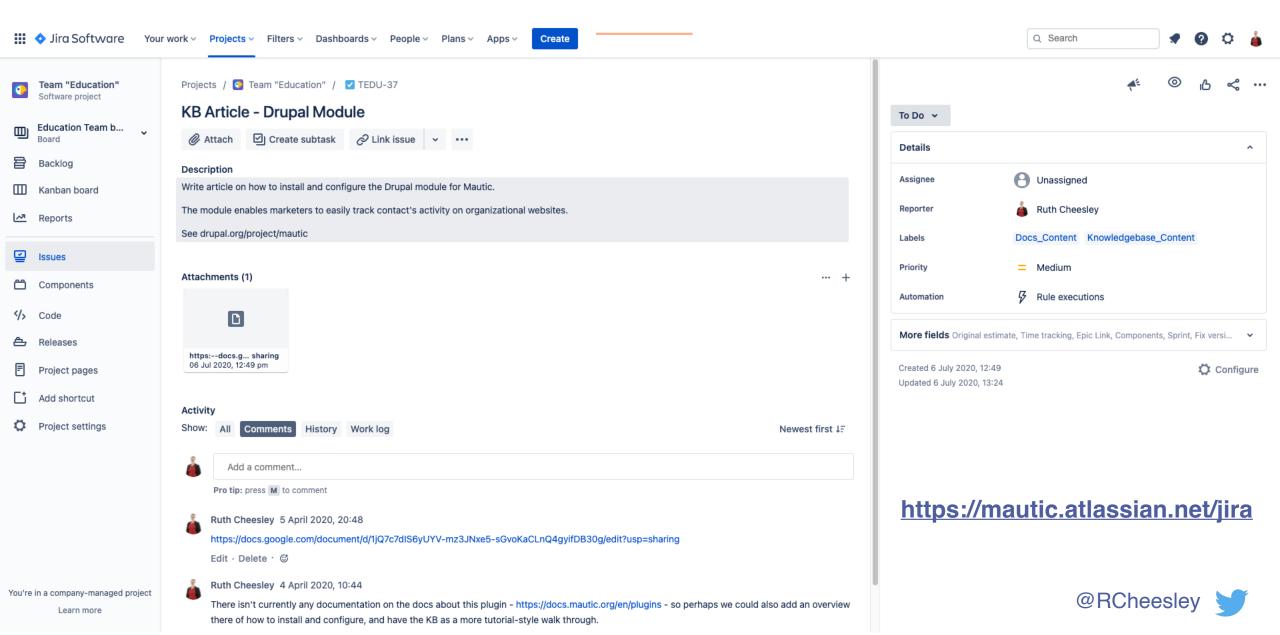


Many Opportunities To Get Involved!



- Teams meet fortnightly on Slack, asynchronously and open to all (get an invite at mautic.org/slack) - channels prefixed with #t-<team>
- Tiger Teams small groups with a focus on a specific area (e.g. email deliverability, accessibility, Campaigns, Forms, etc) prefixed with #tt-<name>
- Working Groups formed for a specific focus, e.g. organising a conference, managing the website, writing the newsletter prefixed with #wg-<name>

Jira Board per Team (Public)



0	Combo boxes aren't accessible bug needs-triage #10430 opened 20 days ago by lilmike 1 task done		
0	MAUTIC - REPORT Error, emails missing from Report bug needs-triage #10420 opened 22 days ago by Dylan-86 O 1 task done		
0	"Default Frequency Rule" seems to be activated by default bug configuration email #10416 opened 24 days ago by oltmanns-leuchtfeuer O 1 task done		
0	Minimal MySQL version for Mautic 4 is not documented bug needs-triage #10414 opened 26 days ago by ttencate 1 task done		
0	Contactimport fails for the contact if an apostrophe (') is in the Email bug import-export #10411 opened 27 days ago by oltmanns-leuchtfeuer 0 1 task done		
0	Forms wouldn't work "Mautic is not defined" bug forms pending-feedback #10408 opened 29 days ago by rafalsk O 1 task done		
0	GrapesJsBuilder vs grapesjsbuilder in plugin_integration_settings bug builder-grapesjs #10399 opened on 1 Sep by donbowman O 1 task done		
0	MJML visual editor adds ID tags which are now deemed as invalid bug builder-grapesjs #10398 opened on 1 Sep by rafalsk O 1 task done		
•	The entity-class Mautic\DynamicContentBundle\Entity\DynamicContentLeadData map dynamic-content #10395 opened on 31 Aug by donbowman 1 task done		
0	Very slow query when opening an email. bug email performance-scalability #10394 opened on 31 Aug by jstawski O 1 task done		
0	Missing check for sql execute return false bug custom-fields #10393 opened on 31 Aug by donbowman 1 task done		
•	Queued mailing won't work ("swiftmailer.transport.real" service or alias has been remoneeds-triage #10392 opened on 31 Aug by rafalsk 1 task done		
0	mautic:unusedip:delete not working in Mautic 4.0.0 bug needs-triage #10387 opened on 31 Aug by TPapajCin O 1 task done		

Issue Triage

- Help with triaging by reviewing Needs Triage issues
- Issues without PRs associated likely need a fix
- Bounty label = funded issue check for details in the issue





Fix Doctrine metadata cache handling during installation #10481

dennisameling wants to merge 4 commits into mautic:4.0 from dennisameling:dont-clear-cache-during...



As described in #10480, we currently remove the cache folder during the installation process. More specifically, just before the database is installed. This approach is problematic because it breaks things like Symfony's Dependency Injection, causing invalid database credentials and/or connection errors to completely crash the installer. Luckily, Doctrine has an option to only remove the metadata cache, which is all we need (more context in #10481 (comment)). This PR changes our logic so that we only clear the metadata cache. This fixes #10480 and significantly improves Mautic's installation speed.

Steps to test this PR:

- Load up this PR locally
- 2. For the remainder of the steps, we assume that you're using DDEV for local development. This allows you to easily drop the database and start clean
- 3. Before testing each scenario below, please ensure you have a clean state where Mautic is not installed: ddev delete --omit-snapshot --yes && rm -rf var/cache && rm app/config/local.php && ddev start

Scenarios to test:

For testing the CLI installation, please run ddev exec php bin/console mautic:install https://mautic.ddev.site -db_driver=pdo_mysql --db_host=db --db_user=db --db_name=db --db_password=db --db_port=3306 -db_table_prefix="mau_" --admin_password=mautic --admin_email="demo@ddev.local" - simply remove -db_table_prefix="mau_" if you want to test without a prefix.

Туре	Database info	Expected outcome
UI installation	Wrong credentials, NO prefix	×
UI installation	Wrong credentials, WITH prefix	×
UI installation	Correct credentials, NO prefix	~
UI installation	Correct credentials, WITH prefix	~
CLI installation	Wrong credentials, NO prefix	×
CLI installation	Wrong credentials, WITH prefix	×
CLI installation	Correct credentials, NO prefix	~
CLI installation	Correct credentials, WITH prefix	~

Testing PRs

- Use gitpod.io (link on all PRs), or
- Check out locally with gh repo clone mautic/ mautic, cd into directory
- DDEV start
- If a bug, test before applying the PR
- gh pr checkout <number> to check out a PR
- Leave findings in a review on the PR in GitHub





Building The Community

- Mautic Developer Days working on Symfony 5
 migration, PHP 8 support, Composer support and
 more come and join our sprint room!
- Supporting on the forums and Slack
- Ideas to help us promote Mautic better
- Supporting our Drupal-based site (it needs a redesign quite badly!)



Join Us **Online** At Mautic Conference Global 2022 On 8-9 June!

- Online conference happening on 8-9 June 2022
- Come and learn about Mautic, contribute to the community and have a great time!
- More information at https://mauticon.mautic.org
 (sponsor opportunities also open!)

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What questions can I answer?

