



MARKETING

Solutions

powered by
pianola

Unit and District User Guide

c. December 2016

Table of Contents

About Marketing Solutions, powered by Pianola	1
Logging into the system	2
Sending messages	3
Choose a template_____	4
Choose target unit/district_____	5
Choose recipients_____	6
Review recipients_____	7
Compose message_____	8
Review message_____	9
Send message_____	10
Need help?_____	10
Mailing letters	11-12
Terms of Service	13-14

About Marketing Solutions, powered by Pianola

Providing units/districts with the tools needed for success is a top priority of the ACBL. We are excited to launch Marketing Solutions, powered by Pianola. This new service will put the power of email marketing at the fingertips of units and districts while removing the ACBL as the middle-man to members.

With the new Marketing Solutions, units/districts will be able to better market regional and sectional tournaments by targeting messages to sub-groups like non-Life Masters and lapsed members. The service can also be used to send newsletters and execute e-marketing campaigns.

Ready to start building a better relationship with your members? It's as easy as a 1-2-3.

- 1** Request an invitation to create an account by contacting emailservices@acbl.org. Unit/district presidents, tournament coordinators and publicity chairs as well as tournament chairs are automatically allowed to have an account. Other users may have accounts with the unit/district president's permission.
- 2** The ACBL has populated each Marketing Solutions database with the member profiles of the unit or district and the surrounding area. Parameters for the database are established in the Terms of Service.
- 3** Once the account is live, units/districts can begin marketing tournaments, reaching out to lapsed players and engaging with members better than ever before.

Choose your template – Select from Save the Date, Regional, Sectional, Non-Life Master, Lapsed and blank email templates.

Select your audience – You can choose recipients based on their home unit or the radius within which they live as related to a zip code in your unit/district. Note: only units you have permission to contact will be available for selection.

Refine recipient list – Use smart groups to create your target audience. Smart group options include fields such as: all current members, masterpoints less than, masterpoints greater than, lapsed members, etc.

Create your message – We've provided placeholder copy as a guide. Modify ours or write your own custom message.

Review and send – In addition to emailing your message, you will be given the option to download a PDF of personalized letters for any member that has opted out of ACBL emails or hasn't provided an email address for contact.

The ACBL will monitor usage to ensure all accounts are adhering to the requirements established in the Terms of Service. Units/districts who misuse the service may be subject to suspension or removal of privileges.

Logging into the system

From the login screen, put in your chosen username and password (you selected these when you registered an account). If you forgot either one, click the “forgot” link and follow the instructions.

Click the green Login button.

ACBL MARKETING Solutions

Username [Forgot?](#)

Password [Forgot?](#)

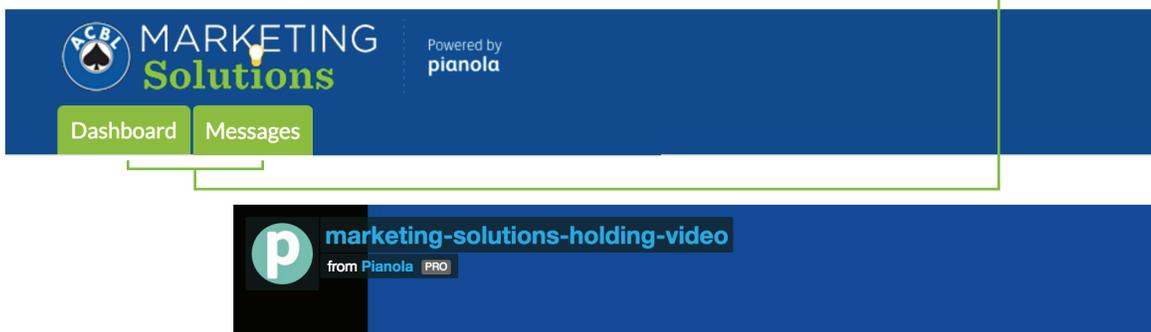
Login

Powered by pianola

From the dashboard

When you log in, you are automatically placed in the user dashboard. From this screen you can watch the video tutorial.

At the top of the page, you will notice there are two green tabs, [Dashboard](#) and [Messages](#). Choose the [Messages](#) tab to create, send or review your emails.



Sending Messages

Upon selecting the Message tab, you will be asked what unit or district you are acting on behalf of. While most will only have one unit that they have authorization to send emails on behalf of, some district officials may have permission to send emails on behalf of their district and the units in their district. Each person's authorizations vary depending on their needs and their role within the ACBL.



Districts & units

Choose who you are acting on behalf of...

ACBL District Unit

Now that you have selected what unit or district you are sending emails on behalf of, you're ready to send your first message!

Choose a Template

The ACBL has designed several templates to meet your needs. Select the option that best describes the goal of your email. In addition to Regional and Sectional tournament templates, there are a few other templates that you will find useful.

Save the Date – Best for alerting members to an upcoming tournament, STaC or event

Non-Life Master – Communicate specifically with the ACBL’s ever-growing Intermediate/Newcomer audience

Lapsed Member – Send emails to former members of your unit/district.

Blank template – Great for general information and non-tournament related emails

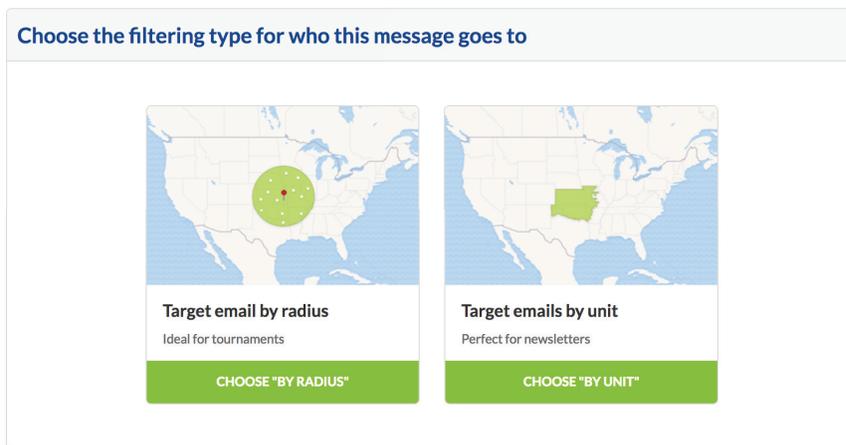
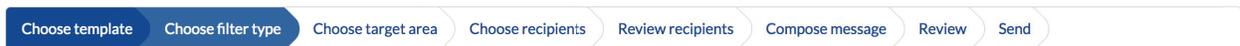
When you have made your choice, click Choose Template. Then click the green “continue” button at the bottom of the screen.

The screenshot shows the ACBL Marketing Solutions interface. At the top, there is a navigation bar with the ACBL logo, 'MARKETING Solutions' text, 'Powered by pianola', and a 'Log out' button. Below the navigation bar are two buttons: 'Dashboard' and 'Messages'. A horizontal sequence of steps is shown: 'Choose template', 'Choose filter type', 'Choose target area', 'Choose recipients', 'Review recipients', 'Compose message', 'Review', and 'Send'. The 'Choose template' step is highlighted. Below this is a 'Choose a template' section with six template cards. Each card shows a preview of the email content and a 'CHOOSE TEMPLATE' button. A green line highlights the 'CHOOSE TEMPLATE' button for the 'Lapsed Member' template.

Template Name	Description
Blank template	Great for general information and non-tournament related emails
Lapsed Member	Send emails to former members of your Unit/District
Save the date	Best for alerting members to an upcoming tournament, STaC or event
Regional	For advertising regional tournaments
Sectional Tournament	Colorado Springs Fall Sectional
Get your	with opportunities for play, education and socializing, don't miss the Annual Charlotte Halloween Regional

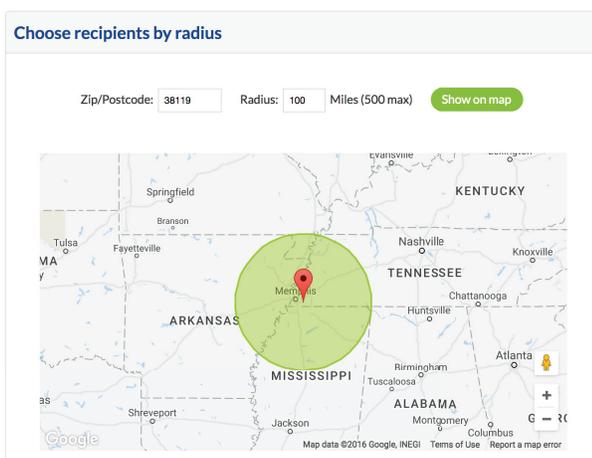
Choose filter type

Marketing Solutions gives you the ability to send emails to players in approved units or to members residing within a certain mile radius of your event. You may only contact members outside your own unit/district to promote an upcoming regional or sectional tournament. Sending an email to your entire database for any other purpose is a direct violation of the Terms of Service.



Choose target area

Once you make your choice of either using the unit or radius function, you can set the area limits.



If you choose to use a radius, you will enter a zip code in your unit/district and an allowed radius. Click “show on map” to see the selected region and then click “continue.”



If you choose to target by unit, you will be able to select among the units you are allowed to contact.

Choose recipients

This is where you can choose to send your email to all members or you can customize your audience. Targeting your message makes it more effective. A generic tournament email won't excite a beginning bridge player. But a non-life master email with details that are relevant specifically to them might be the encouragement they need to visit your tournament.

If you wish to send your email to the entire available database, select "all current members" as the criteria. Click the "add this criteria to smart group" button, and then click the green "continue" button at the bottom of the page.

To target your audience, take advantage of the smart groups. An example: For a non-life master email, you would select "ranking below" and then enter the second criteria of "Life Master." This will limit the email to members you have permission to contact who are not yet Life Masters.

Please note, the above or below search criteria do not mean "including." So to send an email to all members who are Life Master or greater you would need to select "ranking above" and then "Advanced NABC Master."

After making your selection, click the blue "add this criteria to smart group" button.

Once you have chosen your criteria, click the green "continue" button at the bottom of the page.

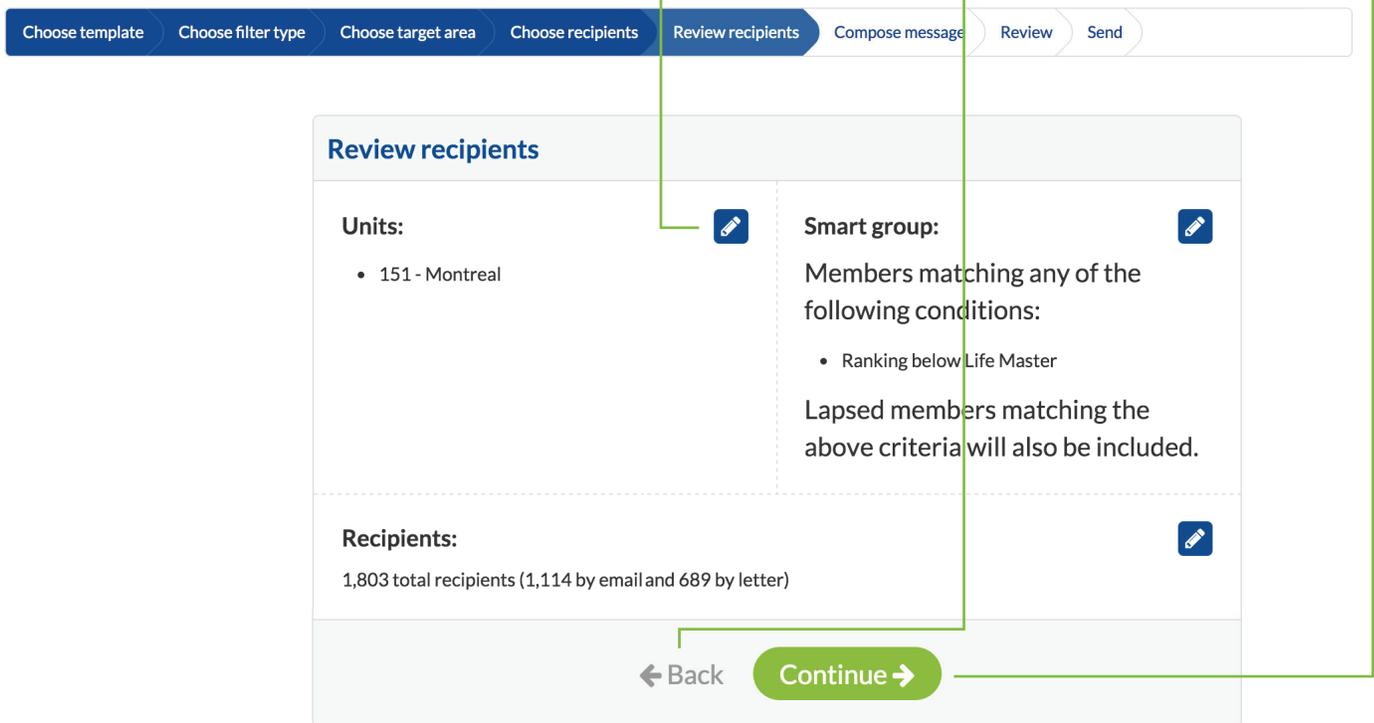
As Marketing Solutions progresses, the custom field option will be populated with useful ways to query your database. Selecting this criterion will allow you to send an email to teachers, club managers, club directors, etc. These individuals are likely some of your most engaged members. Strengthening communications to develop a better relationship with them will greatly improve your unit or district's success.

Review recipients

From this screen you will be able to see the exact group of membership that will receive your message. What unit and/or district you have selected to contact, the smart group criteria you created and finally, the number of members who will receive your message.

In addition to email recipients, this screen tells you how many members you have the option of contacting by sending a hard-copy of this letter. Members in this group either don't have an email address on file with the ACBL or they elected to not receive email correspondence.

If you are satisfied with the recipients, click the green "continue" button at the bottom of the screen. If you would like to make changes, click one of the blue "edit" pencils or the "back" button.



Compose message

Now that you have chosen who you want to send an email to, it's time to create your message.

First, select the email's reply-to address from the drop down menu. This is the address that will receive any replies from recipients. Each unit/district has been given a default reply-to address, but you may elect to change that to your own email address or to any other unit- or district-approved sender's email address. (You may contact emailservices@acbl.org to add approved senders.) The reply-to address must belong to an ACBL member.

Then, give the email a subject line. Try to keep this short and to the point, and don't be too sales-y. The rule of thumb is "tell don't sell" – you can do your selling inside the email itself. We've provided some tips for writing successful email subject lines.

Next, write the body of your email. For all templates minus "Blank" there is suggested copy. Feel free to edit, add or delete this to meet your email's needs. The only item that cannot be deleted is the personalized salutation of "Dear _____."

Finally, if you wish to attach the tournament flier or any other document to the email, do this by clicking the "choose file" button. You may attach more than one document.

When you are satisfied with your email, click the green "continue" button.

The screenshot displays the 'Compose message' interface. At the top is a progress bar with steps: Choose template, Choose filter type, Choose target area, Choose recipients, Review recipients, Compose message (active), Review, and Send. Below the progress bar is the 'Compose message' form. The 'To' field is set to 'Smart group (1,803 recipients)'. The 'Reply-to' dropdown menu is set to 'Unit 151 (unit151director@acbl.org)'. The 'Subject' field is empty, with a 'Tips?' link and a character count of '64'. The 'Content' area has a rich text editor with bold, italic, underline, link, bulleted list, and numbered list icons. The text in the content area reads: 'Dear {first name},', 'Need just a little bit more silver/gold/red to earn your Life Master rank? With opportunities for play, education and socializing, don't miss the [NAME OF YOUR TOURNAMENT]', 'DATES', 'VENUE', 'INSERT FEATURES – FOR EXAMPLE: 0-100, 100-200, 200-300 mp games • Expert lectures daily • Stratified Swiss Teams event • Special novice reception', 'Tournament Co-Chairs: INSERT NAME, PHONE, EMAIL', 'Partnerships: INSERT NAME, PHONE, EMAIL', and 'See attached flier for tournament and housing information.'. Below the content area is an 'Attachments' section with a 'Choose File' button and 'No file chosen' text. At the bottom of the form are 'Back' and 'Continue' buttons.

Review message

From this screen you will see the email as your member will see it. At the bottom of every email, the member will see personalized information about their bridge game including current rank and total masterpoints. In the future, we plan to add more personalized information to this portion of every email.

Preview email

To: Smart group (1,803 recipients) 

Reply-to: Unit 151 (unit151director@acbl.org)

Subject: Tournament Email

 American Contract Bridge League My ACBL Join Now
FUTURE LIFE MASTER



Dear Alexander,

Need just a little bit more silver/gold/red to earn your Life Master rank? With opportunities for play, education and socializing, don't miss the [NAME OF YOUR TOURNAMENT]

DATES
VENUE

INSERT FEATURES - FOR EXAMPLE: 0-100, 100-200, 200-300 mp games • Expert lectures daily • Stratified Swiss Teams event • Special novice reception

Tournament Co-Chairs: INSERT NAME, PHONE, EMAIL
Partnerships: INSERT NAME, PHONE, EMAIL

See attached flier for tournament and housing information.

**Get your
game face on.**

Your current rank is Diamond Life Master. 

Attachments: None 

[← Back](#) [Continue →](#)

Test the message

You can send yourself a test email to check if everything looks right. It may take a few minutes for the email to arrive.

Send test email to:

[Send test message](#)

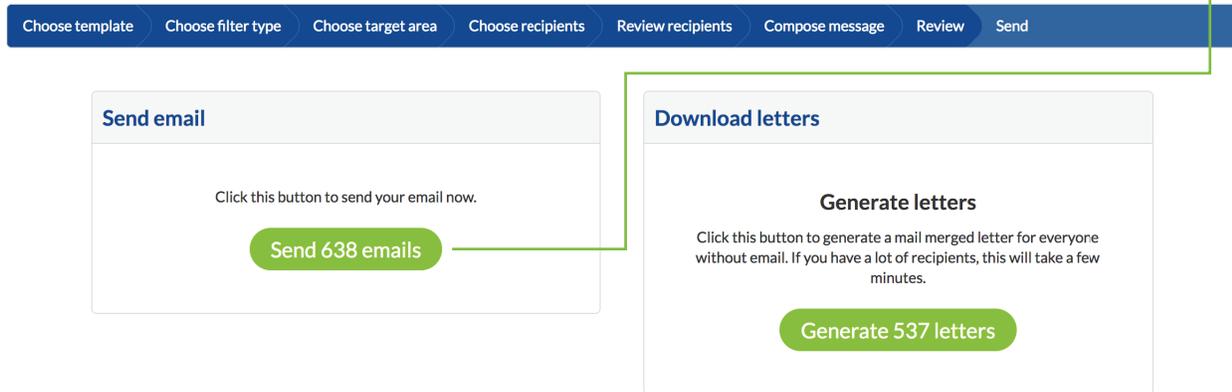
You can also download a sample letter to ensure the plain text content of the message is correct.

[Download a sample letter](#)

Here is also where you may send a test email or download a sample of the letter version.

Send message

You've strategically selected the audience and carefully reviewed the message. It's time to press send!



Once the emails have been sent, you'll be shown a receipt screen that details the who, when and where of your email.

Congratulations! You just took the first step in strengthening your communication channels to improve bridge in your unit/district.

Need help?

For assistance with user permissions or account set up, contact emailservices@acbl.org or call 662-253-3141. For other questions regarding using Marketing Solutions, choosing target markets, writing emails, etc., call or email Mary Maier at Baron Barclay at 1-800-274-2221 or mary@baronbarclay.com. Please note, Baron Barclay has been contracted by Pianola to service the ACBL account.

Mailing Letters

In addition to communicating digitally, Marketing Solutions, powered by Pianola gives you the ability to send a hard-copy letter to members unavailable via email. The ACBL has the ability to send emails to roughly 78% of members, but the other 22% may not be hearing the message.

The letter version is far more simple in design but still contains the body of your email. The letter is customized so that when tri-folded, the mailing address will appear in a screened envelope. Add the tournament flier and a stamp and your tournament will be promoted to more potential players than ever before!

While we encourage you to mail letters to members who are unavailable by email, the cost of envelopes and postage are an expense the unit, district or tournament must incur. If you are mailing to lapsed members, your expenses may qualify for partial reimbursement using the Cooperative Advertising Program. Please visit www.acbl.org/cap to learn more about the requirements for the program.

Download and Print

From both the Review and Sent pages of the Message tab, you have the ability to download letters. Once selected, the system will generate the appropriate letters into one or more PDF documents.

The screenshot shows a navigation bar with the following steps: Choose template, Choose filter type, Choose target area, Choose recipients, Review recipients, Compose message, Review, and Send. Below the navigation bar are two main panels. The left panel, titled 'Send email', contains the text 'Click this button to send your email now.' and a green button labeled 'Send 638 emails'. The right panel, titled 'Download letters', contains the text 'Generate letters' and 'Click this button to generate a mail merged letter for everyone without email. If you have a lot of recipients, this will take a few minutes.' and a green button labeled 'Generate 537 letters'. A green line highlights the 'Generate 537 letters' button.

Mail Letters *Cont.*

Please take a moment to save the PDF in your personal documents for record purposes. Click the hard drive picture to save from the open document. You can also print the letters directly from the PDF page by pressing the printer icon.

The screenshot shows a PDF viewer interface with a dark grey background. At the top, the file name "Letters (1).pdf" is on the left, and "1 / 1" is in the center. On the right, there are icons for refresh, back, forward, and print. The main content is a white letter from the American Contract Bridge League (ACBL). The letter includes the ACBL logo, contact information for Mr S Abrahams and the American Contract Bridge League, a date of 12 Feb 2016, and a subject line "Tournament Email". The body of the letter is addressed to "Dear Sander" and discusses opportunities for play, education, and socializing. It lists "DATES" and "VENUE" and provides "INSERT FEATURES" such as "0-100, 100-200, 200-300 mp games • Expert lectures daily • Straified Swiss Teams event • Special novice reception". It also lists "Tournament Co-Chairs" and "Partnerships" with "INSERT NAME, PHONE, EMAIL" placeholders. The letter concludes with "See attached flier for tournament and housing information." On the right side of the viewer, there are three circular navigation buttons: a double-headed arrow, a plus sign, and a minus sign.

Letters (1).pdf 1 / 1


American Contract
Bridge League

Mr S Abrahams
7038 ch Wavell Cote Saint-Luc QC
H4W 1L7

American Contract Bridge League
6575 Windchase Blvd. Horn Lake MS
38637-1523

Date: 12 Feb 2016
ACBL No: 9088075
Subject: Tournament Email

Dear Sander

Need just a little bit more silver/gold/red to earn your Life Master rank? With opportunities for play, education and socializing, don't miss the [NAME OF YOUR TOURNAMENT]

DATES
VENUE

INSERT FEATURES – FOR EXAMPLE: 0-100, 100-200, 200-300 mp games • Expert lectures daily • Straified Swiss Teams event • Special novice reception

Tournament Co-Chairs: INSERT NAME, PHONE, EMAIL
Partnerships: INSERT NAME, PHONE, EMAIL

See attached flier for tournament and housing information.

Terms of Service

Please read these Terms of Service carefully before registering an account or using Marketing Solutions, powered by Pianola (the “Service”), an email service and member database provider operated by the American Contract Bridge League (ACBL). By creating an account with the Service, you are an active User and required to adhere to the following guidelines.

Usage of the Service must reflect the ACBL Privacy Policy and Terms of Use of members’ and lapsed members’ contact information. Those using member information in a way that violates the ACBL Privacy Policy or the Terms of Use may be subject to civil lawsuit and further ACBL disciplinary action in accordance with ACBL’s Code of Disciplinary Regulations.

Subscriptions

The Service is a customized version of Pianola specifically for ACBL Units and Districts. The ACBL will provide the Service at no cost to Units and Districts for a free trial period until the end of 2017. At the end of the free trial, Units and Districts wishing to continue use of the Service will enter into an agreement with Pianola. Pricing after the trial period will be \$20 each month for Units and \$50 each month for Districts.

Content

The ACBL will manage the user permissions, member database and templates each Unit and District has access to when using the Service.

Units and districts are limited to the following approved uses as per the ACBL Terms of Use:

- Announcements and promotions of ACBL-sanctioned bridge events led by the Unit/District
- Announcements and newsletters discussing activities of the Unit/District
- Birthday or similar greetings

The following are unapproved uses:

- Personal or private fundraisers, even if bridge-themed
- Personal or private business opportunities or investments, even if bridge-themed
- Personal or private programs, even if bridge-themed
- Anything not included in the approved uses above

Terms of Service *Cont.*

Permissions

Units and Districts and their Users will have access to specific ACBL member databases (“Permissions”) that will be determined by the ACBL. The ACBL will determine Unit and District Permissions based upon proximity and necessity. Users may request a change to Permissions on behalf of the Unit or District they are acting on by emailing emailservices@acbl.org. Requests will be reviewed, and Permissions will be given at the sole discretion of the ACBL.

Tournament Communications: For emails about upcoming tournaments, Units may contact surrounding Units or members in a 200-mile radius, and Districts may contact surrounding members in a 500-mile radius.

Other Email Communications: For all purposes other than tournament communications, Units and Districts may only contact their respective Unit/District. Contacting other Units or Districts will result in restricted future usage, including but not limited to disabling allowed senders and limiting ability to contact other Units or Districts for tournament communications. (See Termination below.)

Purchases

If a Unit or District elects to upgrade the Service with Pianola, they will be responsible for the cost even if it is within the trial period. Upgrading allows the User access to additional tools provided by Pianola, while still allowing the ACBL to provide content for accessing its member database.

Termination

The ACBL may terminate Service to any User who is found to be in violation of the Terms of Service. The ACBL may suspend or terminate Service to any Unit or District with a User in violation of the Service. At any time during or after the Service’s free trial period a Unit or District may elect to terminate Service. If terminated, Users will have no access to the Service but may continue to access the limited Tournament Email Services provided by the ACBL. The Tournament Email Services program provides members in a pre-determined area a notice of an upcoming tournament upon request only. Notices are general announcements of location, date and contact information.



Contact us

For questions regarding the Terms of Service for Marketing Solutions, powered by Pianola contact emailservices@acbl.org.