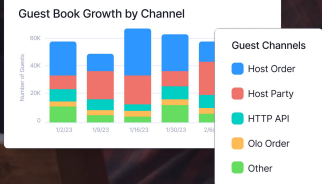




### Guest Book Growth

802,646	195,044	142,223	52,821
Total Guests	Total Opt-ins	Email Opt-ins	SMS Opt-ins



**Casey Novak**  
casey.novak@gmail.com

**\$68.34** 15% ↑  
Average Spend

### GUEST PROFILE

**Casey Novak**  
casey\_novak@example.com | Last Visit: 4 days ago | CLV: \$564.98

AUDIENCE	SIZE	GUESTS	CAMPAIGN
High Value Guests	1.2M	OFF	ON
Weekday Warriors	405K	OFF	ON

Automation Settings: Credit Card Token, Automated Email, Reviews, Automated SMS, WiFi Opt-In

**Lee Green**  
green.lee@gmail.com

**\$500**  
Guest Lifetime Value

SEND VIA SMS

- Lapsed Guests
- High LTV
- Loyalty Members

# Olo Engage Marketing Automation Guide



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**Pg. 3-5** Getting Started with Marketing Automations

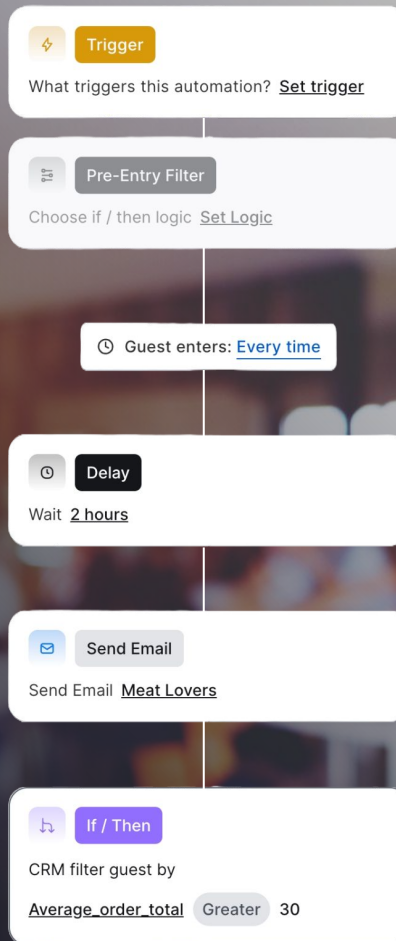
**Pg. 6-11** Engage Building Blocks

**Pg. 12-17** Creating an Automation

**Pg. 18-20** Automation Templates

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**Pg. 60** Additional Resources





GDP



Marketing

Marketing Strategy

## Why Automations?

*I have way too much free time on my hands, said no one ever in the restaurant industry.*

There are many ways to influence guest behavior but many brands struggle to find the time and overcome the technical obstacles to execute their ideal marketing vision.

Enter **Marketing Automation**.

Imagine having unlimited time and resources to develop campaigns for every guest based on their unique behavior. This is precisely what Marketing Automation *unlocks*—it turns personalized, one-to-one marketing from an aspiration to a reality.

## Marketing Automation Benefits

- ✓ Scalably orchestrate multi-touchpoint journeys that drive guest frequency, retention, and spend
- ✓ Deepen relationships with guests by reaching them at the right time, at the right place, with the right message
- ✓ Save time using a guided automation builder and library of recommended automations—no IT support or SQL required

**\$2.7M**

Spent by [First Watch](#) email recipients within 90 days of launching new automations

**70%**

Of respondents said personalized recommendations made them feel known ([FSTEC](#))

**\$5.44**

The average return for every dollar spent on marketing automation ([Nucleus Research](#))

# Marketing Automation: Launch Preparation

## Strategy

- › What are the guest behaviors you are trying to encourage?
- › When a guest takes a specific action, what would you ideally like to happen?
- › How are you measuring guest engagement and lifetime value?

## Journey Orchestration

- › What data sources and events are you capturing in GDP?
- › How would you ideally configure the guest journey in different scenarios?

## Templates

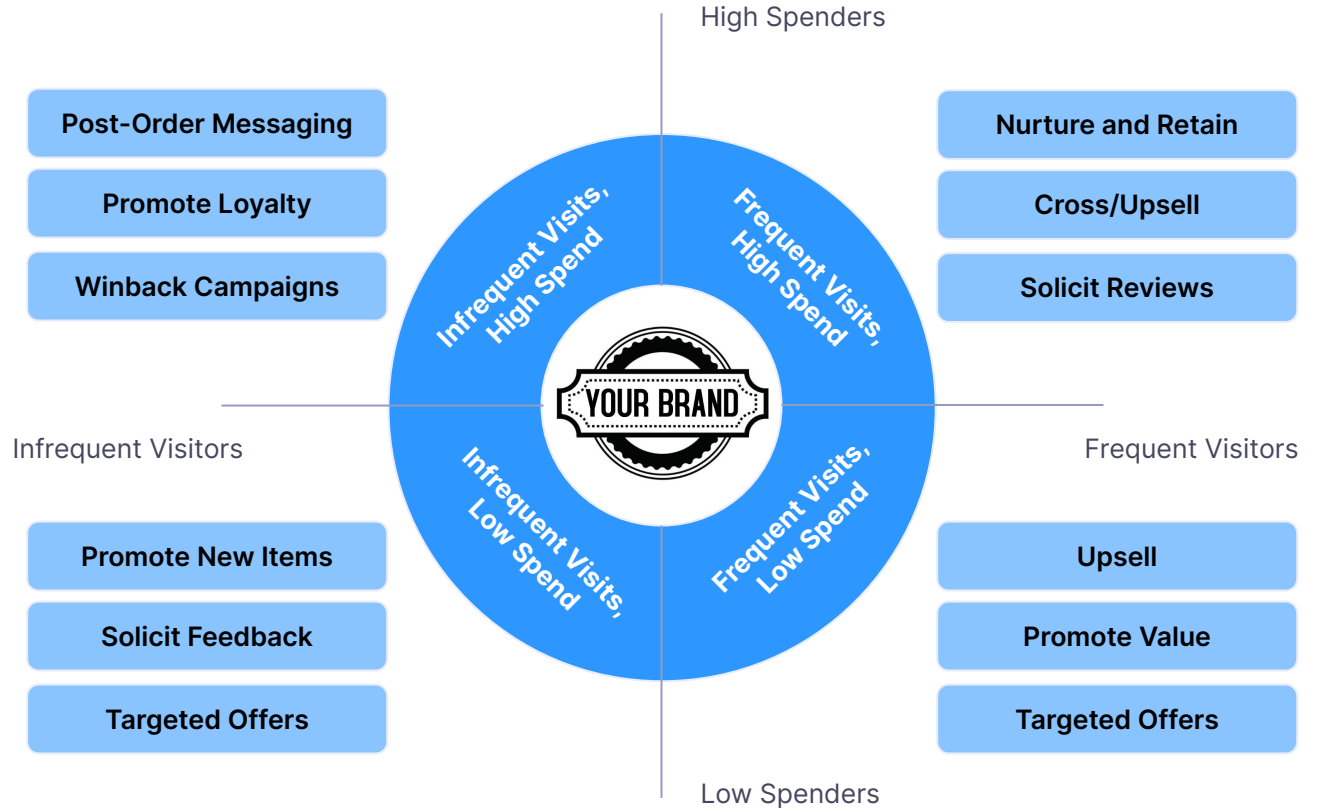
- › What content do you want to display to the guest?
- › What channels will you be using to reach guests?

# Connecting Strategy to Journeys

Remember, there's *no such thing as an average guest*. A guest who infrequently visits but spends a lot when they do is different than a regular who spends relatively little in each individual visit.

As you identify these guests in GDP, you can *influence their behavior* using targeted, timely automations to nudge each guest archetype toward your desired business outcomes.

## Automations by Guest Archetype



# Engage Building Blocks

# Engage **Building Blocks**: Segment Attributes



## Default Properties

**Reserved fields** passed in *Identify* or *Track Events* that are tied to a guest. These are standardized across all brands using GDP.

### Examples:

- Email Address
- Phone Number
- UUID (unique user ID within GDP)



## Custom Properties

Any **custom fields** passed in *Identify* or *Track Events*. These are defined by specific use cases and vendor integrations.

### Examples:

- Loyalty Tier
- Subscriber Status
- Gender
- Menu Item Preferences



## Computed Properties

Guest-level, **customizable calculations** based on *Track Events* that dynamically update as guests engage with your brand.

### Examples:

- *Count* of orders in the last 30 days
- *Sum* of loyalty points redeemed



## Smart Properties

Advanced business and guest intelligence insights that **analyzes** past guest behavior and **predicts** future engagement.

### Examples:

- Historical Spend
- Predictive GLV
- Six Month Churn Risk
- RFM Quantile

*Segment Attributes* enable the grouping of guests by specific behaviors and events.

A comprehensive list of them can be found [here in the Engage Help Center](#).

# Engage **Building Blocks**: Automation Components



## Set Trigger

An **action**, **behavior**, or **date-based event** that prompts the automation.

### Examples:

- Order Completed
- Visited
- Party Seated
- Segment Entered
- Guest Birthday



## Pre-Entry Filter

The additional **conditions** a guest must meet to be eligible for the automation.

### Types:

- **Event**: Further refine the *Trigger* by Event Field
- **Segment**: Must be in a pre-built *Segment*
- **CRM**: Further refine by *Segment Attribute*



## Entry Recurrence

The **frequency** in which guests enter the automation when meeting other criteria.

### Options:

- Every time
- Only the first time
- At most once every # days



## Add Action

The final **output** of the automation received by the guest.

### Examples:

- Send Email
- Send SMS/MMS
- Send Push Notification
- Send Sparkfly Wallet Offer



## If / Then

(Optional) Allows for **branching paths** in guest journeys that lead to different *Actions*.



## Set Delay

(Optional) Holds up the **next Action** from being taken for a predefined amount of time.

# Automation Triggers: Example Names and Definitions

Name	Definition
Completed an Online Order	When a guest successfully completes an online order directly with the restaurant.
Created Profile via Web Form	When a guest accesses a brand's website and signs up to receive marketing communications via an Olo-integrated web form.
Opted into SMS Marketing	When a guest signs up to specifically receive SMS/MMS marketing communications from a brand.
Party Seated	When a guest is seated to a table via the Host app.
Segment Entered	When a guest meets specific predefined criteria and thus enters the applicable, existing GDP Segment.
Segment Exited	When a guest no longer meets specific predefined criteria and thus exits the applicable, existing GDP Segment.
Signed Up via Olo	When a guest accesses a brand's Olo Ordering-enabled site and signs up to receive marketing communications via the order flow.
Signed Up via WiFi	When a guest accesses a brand's Olo-integrated WiFi Splash Page and signs up to receive marketing communications.
Updated Profile via Web Form	When a guest record already exists in GDP but new information is added or updated.
Visited	When a guest is seated via Olo Host, joins an Olo Engage integrated WiFi system, <b>OR</b> places an online order.

## Automation Properties: Example Names and Definitions

Type	Name	Definition
Dates	Abandoned Party Time(s)	The time a party joined the waitlist but was not seated.
Dates	Check Time(s)	If a POS check is attached to a guest, this is the time the check was closed.
Dates	Online Order Time	The time an order was made by a guest.
Dates	Time of Last Check	The last date on which a POS ticket was attached to a guest.
Dates	Time of Last Visit	The last date Olo Engage has recorded a visit of any kind—includes both in-store and online (only one record per guest).
Dates	Time of Visit	The date Olo Engage has recorded a visit of any kind—includes both in-store and online.
Details	Check Prices	The amount in dollars and cents of a guest's check.
Details	Check Tips	The amount in dollars and cents of a guest's tip(s).
Details	Lifetime Frequency	Total number of days since their very <i>First Visit</i> divided by their <i>Total Number of Visits</i> , in-store and online. For example, if my very first visit was 120 days ago and I've visited twice, my Lifetime Frequency is 60 days.
Details	Number of Visits	The cumulative total visits Olo Engage has recorded a visit of any kind—includes both in-store and online.
Details	Online Order Check Total(s)	The amount in dollars and cents of a guest's online order.

## Automation Properties: Example Names and Definitions

Type	Name	Definition
Details	Online Order Delivery Method	The delivery method the guest chose for their online order, which comes from predefined Olo fields.
Details	Online Ordered Item(s)	The specific menu item(s) in a guest's online order.
Details	Online Ordering Platform	The ordering interface the guest used to place an order (e.g. online, guest app, and third party).
Details	Ordered Item(s)	The specific menu item(s) in a guest's order as recorded by the POS.
Details	Party Size	The number of guests associated with a particular party.
Details	Survey Score	The score registered by a guest on a survey using rating/NPS score values.
Details	Time of First Visit	The first date Olo Engage has recorded a visit of any kind—includes both in-store and online visits.
Details	WiFi Dwell Time	The time in minutes between when a guest's phone first connects to WiFi to the time they disconnect.
Location	Location Visited	When a guest visits a specific location, with support for multiple locations per guest—includes in-store and online orders.
Location	Unique Location Visits	The number of <i>Visits Per Guest</i> across all available locations—includes in-store and online orders. For example, 'Unique Location Visits greater than 5' will return all guests who have visited 5 or more unique locations.



# Creating an Automation



Building Automations

# Automation Library

The Engage Dashboard features **prebuilt marketing automations** in the **Automation Library**. These are a great way to get started on your marketing automation journey as they cover a variety of common use cases for improving guest frequency, retention and spend.

To access the Automation Library, log into the Engage Dashboard and navigate to: *Automations > Create Automation > Create from Template*



## Create Custom Automation

Create your own custom Automation from scratch using a blank template.

Learn all the best tips & tricks for setting up your own automation recipes from scratch.

[Read how here ->](#)

Use Automation



Retention



## Anniversary Celebration

Incentivize guests to celebrate their special occasion at your restaurant with a special offer.

Stay top of mind with guests for special events and drive reservation bookings by adding a 'Reserve Now' CTA in your message.

Use Automation



Retention



## Birthday Celebration

Surprise and delight guests with a personalized birthday message and special redeemable treat.

Birthday emails have a 480% higher conversion rate and yield over 340% higher revenue per message.

Use Automation



Spend

Frequency



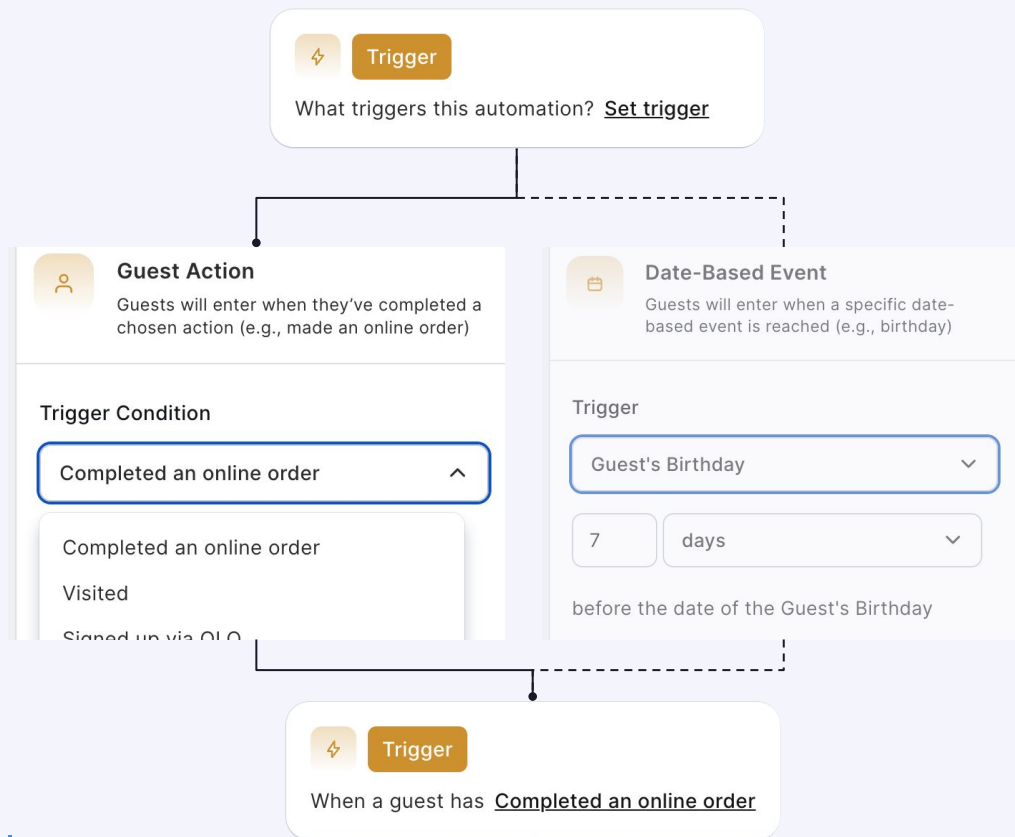
## Cross-/Upsell Online Orderers

Highlight your most popular and profitable takeaway menu items to your off-premise regulars.

These digital superstars consistently drive digital sales. Keep them engaged and drive higher AOV by surfacing new and premium menu items.

Use Automation

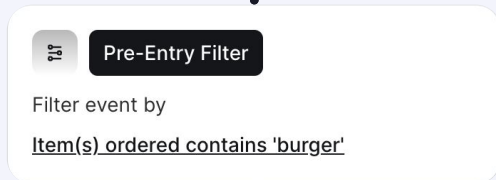
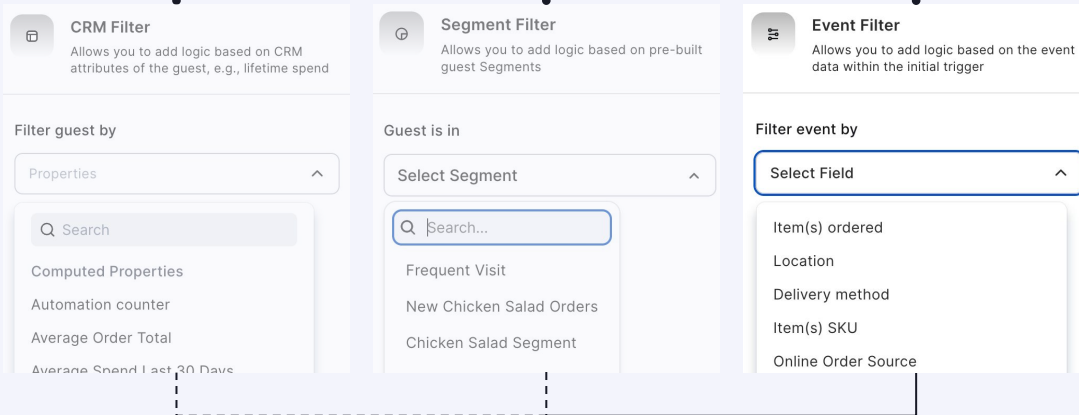
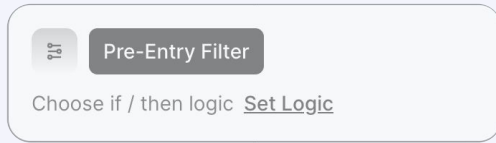
# Building Automations: Triggers



The *Trigger* is the starting point of the automation that enables dynamic targeting

- ✓ **Ask Yourself:** What are the common things guests do and how would you ideally engage guests in each scenario?
- ✓ **Trigger Types:** Action and Date-Based
  - **Action:** Specific events like *Orders*, *Visits*, and *Segment Entry/Exit*
  - **Date:** Message guests prior to their *Birthday* or *Anniversary*
- ✓ **Keep in Mind:** The Triggers available will depend on your tech stack, service model, and available CRM data.

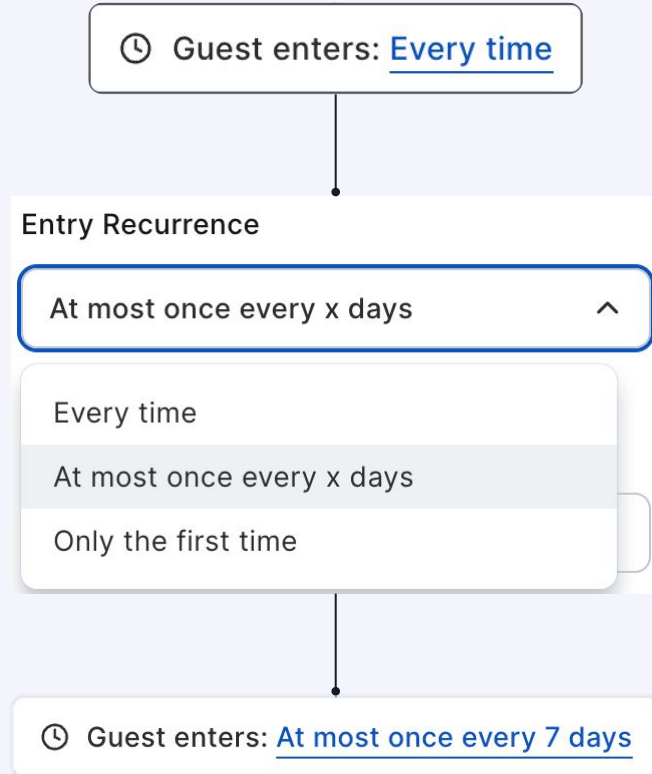
# Building Automations: Pre-Entry Filters



The *Pre-Entry Filter* enables further segmentation of the initial dynamic targeting

- ✓ **Ask Yourself:** Of all the guests that fit the *Trigger* criteria, how would you further segment them to tailor messaging?
- ✓ **Filter Types:** CRM, Segment, and Event
  - **CRM:** Guest attributes (i.e. Properties) like *Lifetime Spend* and *Frequency*.
  - **Segment:** Refine the audience based on your existing Engage Segments.
  - **Event:** Refine the audience using additional event data from the Trigger.
- ✓ **Keep in Mind:** *CRM* filters look at a guest's entire history while *Event* filters look at a specific event payload.

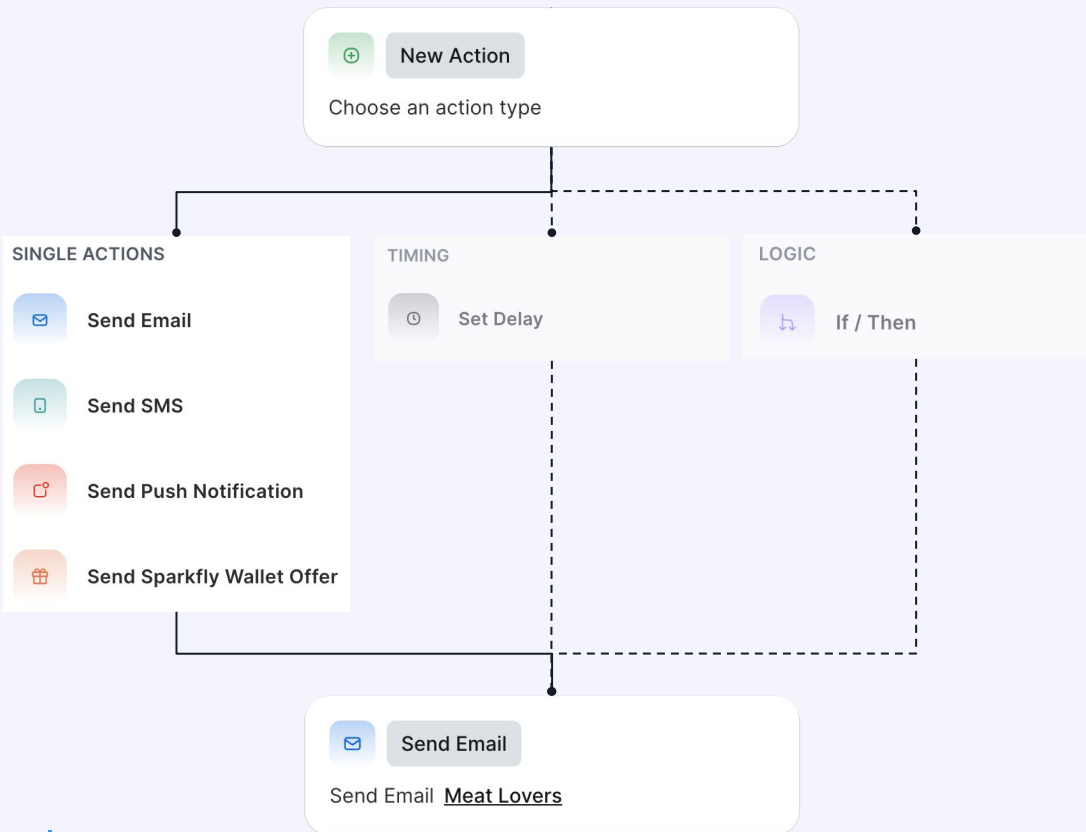
## Building Automations: Entry Recurrence



The *Entry Recurrence* is what determines how often a guest enters the automation flow

- ✓ **Ask Yourself:** How often does it make sense to communicate with eligible guests with this particular message?
- ✓ **Recurrence Types:** Three options
  - Only the first time
  - Every time
  - At most once every [#] of days
- ✓ **Keep in Mind:** What other automations are active is important context—consider the total number of communications a guest may be receiving.

# Building Automations: Actions

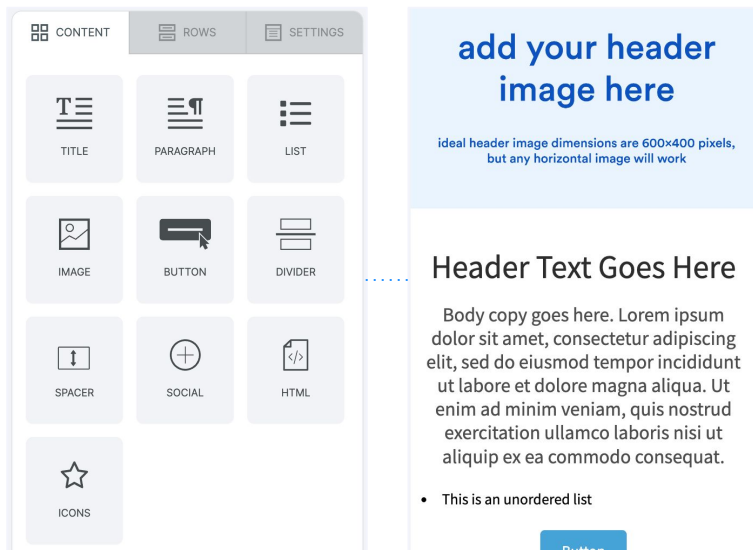


The *Action* sets the messaging channel and enables additional (*optional*) automation logic

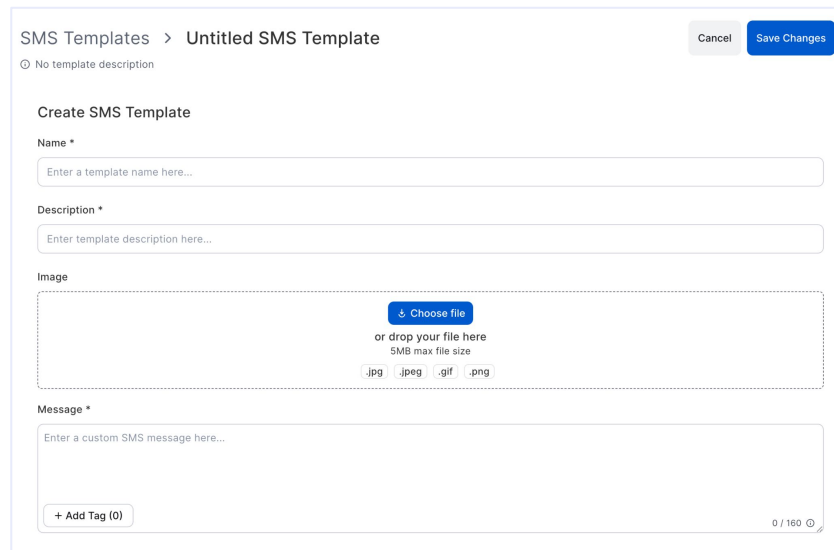
- ✓ **Ask Yourself:** How much time should pass between the *Trigger* and the guest receiving the communication?
- ✓ **Action Types:** Three settings to review
  - **Single Action:** The channel in which the guest will be messaged.
  - **Timing:** The delay, if desired, between the Trigger and Single Action.
  - **Logic:** Branching *If/Then* logic using CRM, Segment, and Event Filters.
- ✓ **Keep in Mind:** Single Actions require the use of an already existing *Template*.

# Automation Templates

# Marketing Automation: Creating Templates



The **Email Template Builder** allows you to drag and drop predefined elements into a WYSIWYG design canvas.

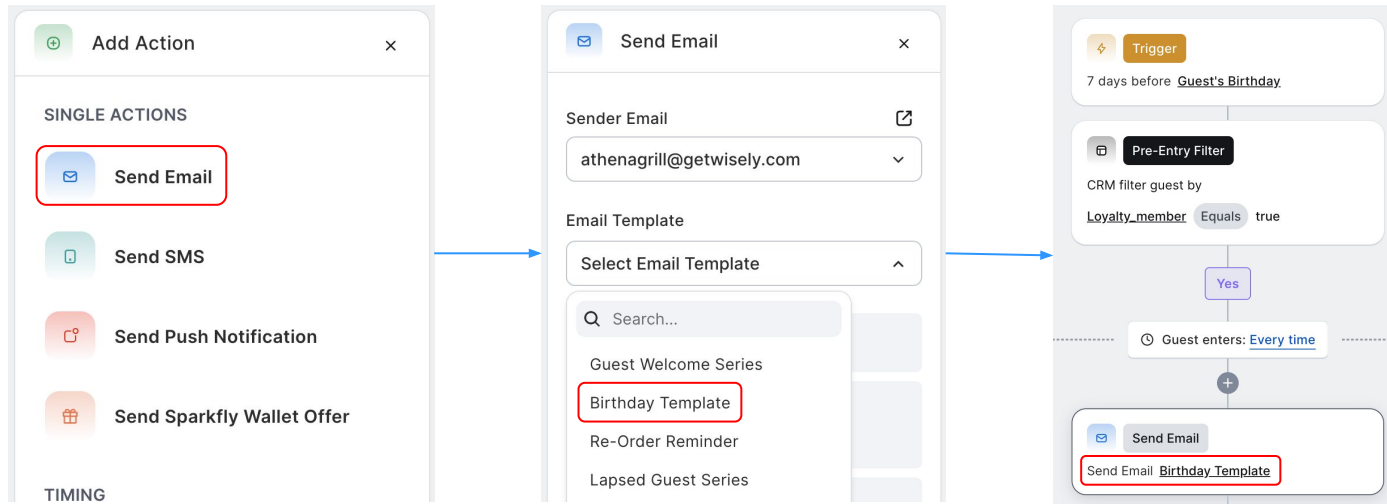


The **SMS/MMS Template Builder** allows you to input creative and includes a character counter to prevent overage charges.

**Reminder:** *Starter Templates* can be used for Automations or Campaigns and can be found under *Settings > Design Library*. *Automation Templates* can only be used for Automations.

# Marketing **Automation**: Inserting Templates

In an Automation the *Template* determines the content the guest receives, which can be further customized using [Merge and Dynamic Substitution Tags](#)



While *Segment Attributes* are they key to unlocking scalable targeting in **Marketing Automations**, *Templates* unlock scalable personalized content experiences.

# Automations Use Cases and Examples

# Example Marketing Automations



[Nurture High-Value Guests](#)



[Cross-/Upsell Online Orderers](#)



[Re-engage Lapsed Guests](#)



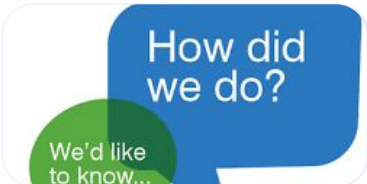
[Upsell Budget-Conscious Guests](#)



[Convert Quasi Regulars](#)



[Convert High Potential Guests](#)



[Retain High-Spend New Guests](#)



[New Guest Welcome Series](#)

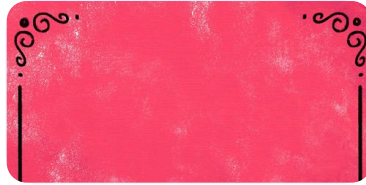
As a **Marketer**, I want to:

- [Nurture High-Value Guests](#)
- [Cross-/Upsell Online Orderers](#)
- [Re-engage Valuable Lapsed Guests](#)
- [Upsell Budget-Conscious Guests](#)
- [Convert Quasi Regulars](#)
- [Convert High-Potential Guests](#)
- [Retain High-Spend New Guests](#)
- [Launch a New Guest Welcome Series](#)

# Example Marketing Automations



[Birthday Celebrations](#)



[Anniversary Celebrations](#)



[Post-Online Order Surveys](#)



[Item-Specific Surveys](#)



[Post-Visit Surveys](#)



['You May Also Like' Upselling](#)



[Review Solicitation](#)

## As a Marketer, I want to:

- [Automate Birthday Campaigns](#)
- [Automate Anniversary Campaigns](#)
- [Automate Post-Online Order Surveys](#)
- [Automate Item-Specific Surveys](#)
- [Automate Post-Visit Surveys](#)
- [Automate 'You May Also Like' Upselling](#)
- [Automate Review Solicitation](#)

# Automate: Nurturing High-Value Guests

Ask your VIPs to leave reviews and reward their loyalty with early access to promotions and events

## Goal

- › Improve retention

## Guest Archetype

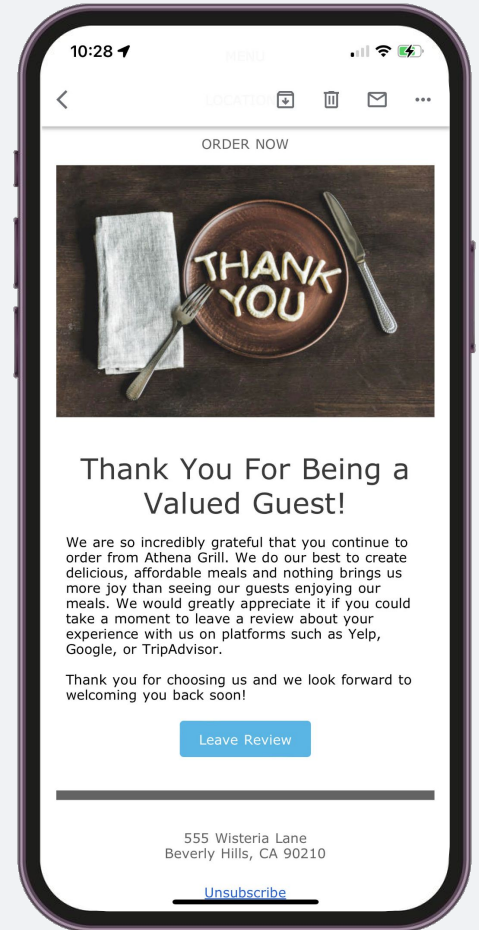
- › Frequent visitor, high spender

## Why Automate

- › These are ideal guests to retain and attract more of—regulars with high check averages

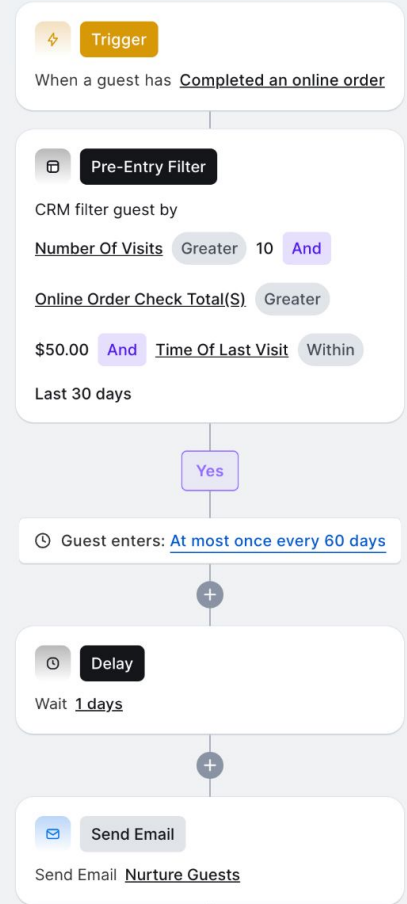
## Considerations

- › Use these segments to create lookalike audiences in paid guest acquisition campaigns



# Automate: Nurturing High-Value Guests

	On-Premise	Off-Premise
Trigger	When a guest has <u>Party Seated</u>	When a guest has <u>Completed an Online Order</u>
Pre-Entry Filter	CRM filter guest by <u>Number of Visits Greater 10</u> AND <u>Check Prices Greater \$50</u> AND <u>Time Of Last Visit Within Last 30 Days</u>	CRM filter guest by <u>Number of Visits Greater 10</u> AND <u>Online Check Total(s) Greater \$50</u> AND <u>Time Of Last Visit Within Last 30 Days</u>
Entry Recurrence	At most once every <u>60</u> days	
Time Delay	Wait <u>1</u> days	
If/Then Logic	(None)	(None)
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> No</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> No</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> No</li> </ul>



# Automate: Nurturing High-Value Guests - Advanced

	On-Premise	Off-Premise	On & Off Prem Combination
Trigger	When a guest has <u>Party Seated</u>	When a guest has <u>Completed an Online Order</u>	When a guest has <u>Visited</u>
Pre-Entry Filter	CRM filter guest by <u>Computed Property Count of Party Seated Greater 10 AND Check Prices Greater \$50 AND Time Of Last Visit Within Last 30 Days</u>	CRM filter guest by <u>Computed Property Count of Online Orders Greater 10 AND Online Check Total(s) Greater \$50 AND Time Of Last Visit Within Last 30 Days</u>	<b>Segment</b> filter guest by <u>Number of Visits Greater 10 AND Time of Last Visit Within Last 30 Days</u>  <b>CRM filter</b> guest on <u>Online Check Total(s) Greater \$50 OR Check Prices Greater \$50</u>
Entry Recurrence	At most once every <u>60</u> days		
Time Delay	Wait <u>1</u> days		
If/Then Logic	(None)	(None)	(None)
Action	Send Email or SMS/MMS		
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> N/A</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> No</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> N/A</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> Optional</li> </ul>

# Automate: Nurturing High-Value Guests - Payment Processor Integrated

	On-Premise	Off-Premise	On & Off Prem Combination
Trigger	When a guest has <u>Party Seated</u>	When a guest has <u>Completed an Online Order</u>	When a guest has <u>Visited</u>
Pre-Entry Filter	CRM filter guest by <u>Total Card Swipes Greater 10 AND Check Prices Greater \$50 AND Days Since Last Card Swipe Less Last 30 Days</u>	CRM filter guest by <u>Total Card Swipes Greater 10 AND Online Check Total(s) Greater \$50 AND Days Since Last Card Swipe Less Last 30 Days</u>	Guest is in <u>RFM 111</u> Segment ( <i>Segment configured as 'RFM Quantile' Equals 111</i> )
Entry Recurrence	At most once every <u>60</u> days		
Time Delay	Wait <u>1</u> days		
If/Then Logic	(None)	(None)	(None)
Action	Send Email or SMS/MMS		
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> Yes</li> <li>● <b>WiFi:</b> Optional</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> No</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> Yes</li> <li>● <b>WiFi:</b> N/A</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> Yes</li> <li>● <b>WiFi:</b> Optional</li> </ul>

# Automate: Cross-/Upselling Online Orderers

Highlight your most popular and profitable takeout menu items to your off-premise regulars

## Goal

- > Increase spend

## Guest Archetype

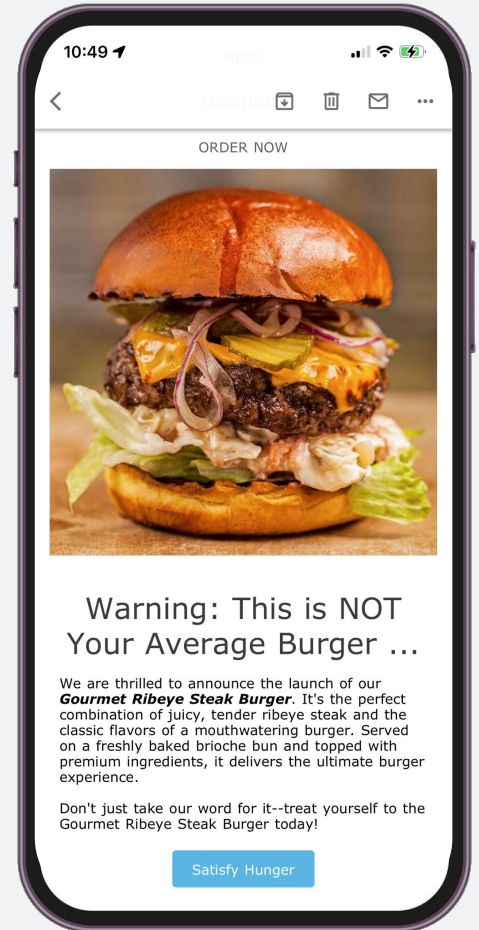
- > Frequent visitor, high spender

## Why Automate

- > Keep these guests engaged and drive higher AOV by surfacing new and premium menu items.

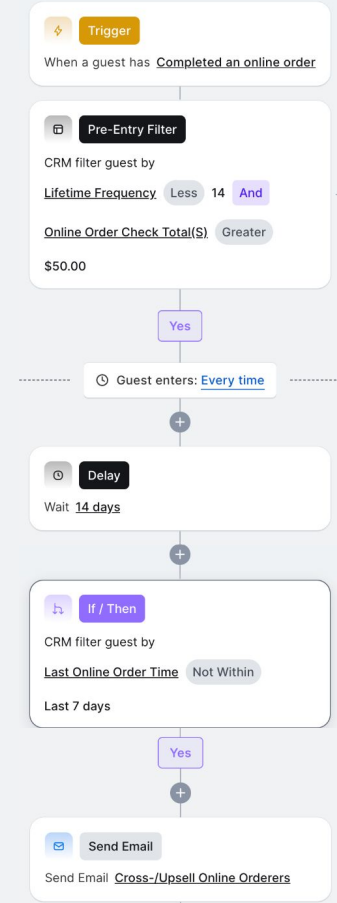
## Considerations

- > Slip a special dine-in only promotion in their takeout bag to encourage in-restaurant visits



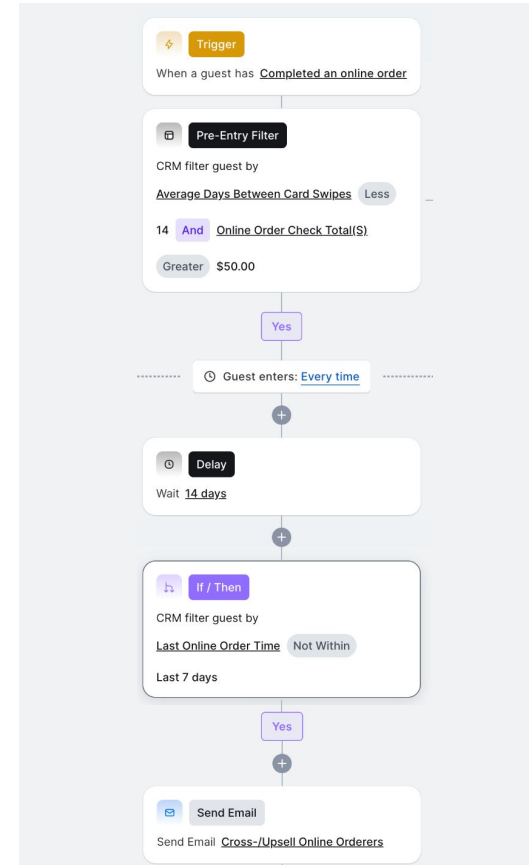
# Automate: Cross-/Upselling Online Orderers

	On-Premise	Off-Premise
Trigger	N/A	When a guest has <u>Completed an Online Order</u>
Pre-Entry Filter	N/A	CRM filter guest by <u>Lifetime Frequency Less 14</u> AND <u>Online Order Check Total(s) Greater \$50</u>
Entry Recurrence	Every time	
Time Delay	Wait <u>14</u> days	
If/Then Logic	N/A	CRM filter guest by <u>Last Online Order Time Not Within</u> Last <u>7</u> Days
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> N/A</li> <li>● <b>POS:</b> N/A</li> <li>● <b>Online Order:</b> N/A</li> <li>● <b>Payment Processor:</b> N/A</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> N/A</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> No</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> No</li> <li>● <b>Loyalty:</b> No</li> </ul>



# Automate: Cross-/Upselling Online Orderers - [Payment Processor Integrated](#)

	On-Premise	Off-Premise
Trigger	N/A	When a guest has <u>Completed an Online Order</u>
Pre-Entry Filter	N/A	CRM filter guest by <u>Average Days Between Card Swipes</u> <i>Less 14</i> AND <u>Online Order Check Total(s)</u> <i>Greater \$50</i>
Entry Recurrence	Every time	
Time Delay	Wait <u>14</u> days	
If/Then Logic	N/A	CRM filter guest by <u>Last Online Order Time</u> <i>Not Within</i> Last <u>7</u> Days
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> N/A</li> <li>● <b>POS:</b> N/A</li> <li>● <b>Online Order:</b> N/A</li> <li>● <b>Payment Processor:</b> N/A</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> N/A</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> No</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> Yes</li> <li>● <b>WiFi:</b> No</li> <li>● <b>Loyalty:</b> No</li> </ul>



# Automate: Re-engaging Lapsed High-Value Guests

Reminds these once-VIPs of their favorite menu items and consider enticing them back with an LTO

## Goal

- Improve retention

## Guest Archetype

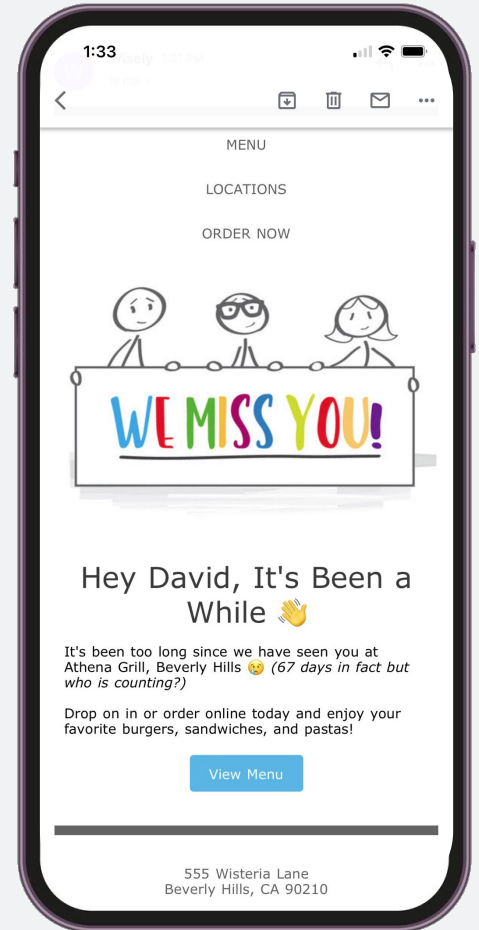
- Former frequent visitor, high spender

## Why Automate

- The top-5% of guests drive ~30% of sales—win these guests back to protect revenue

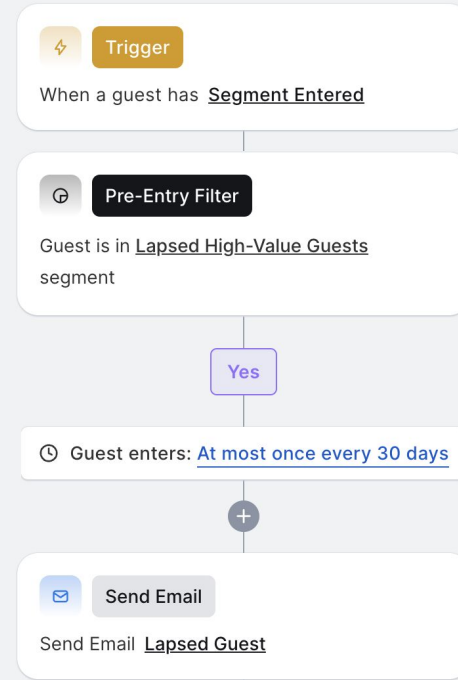
## Considerations

- Test and adjust the *Lifetime Frequency* and *Delay* values to identify the right balance of messaging frequency



# Automate: Re-engaging Lapsed High-Value Guests

	On-Premise	Off-Premise
Trigger	When a guest has <u>Segment Entered</u>	
Pre-Entry Filter	Guest is in <u>Lapsed High-Value Guests</u> segment ( <i>Segment configured as 'Time of Last Visit' Not Within Last 30 days AND Lifetime Frequency Less Than 14</i> )	
Entry Recurrence	At most once every <u>30</u> days	
Time Delay	(None)	
If/Then Logic	(None)	
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> Optional</li> <li>● <b>Loyalty:</b> No</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> N/A</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> No</li> </ul>



# Automate: Upselling Budget-Conscious Guests

Promote bundled menu items and LTOs to highlight value savings and increase average check size

## Goal

- Increase spend

## Guest Archetype

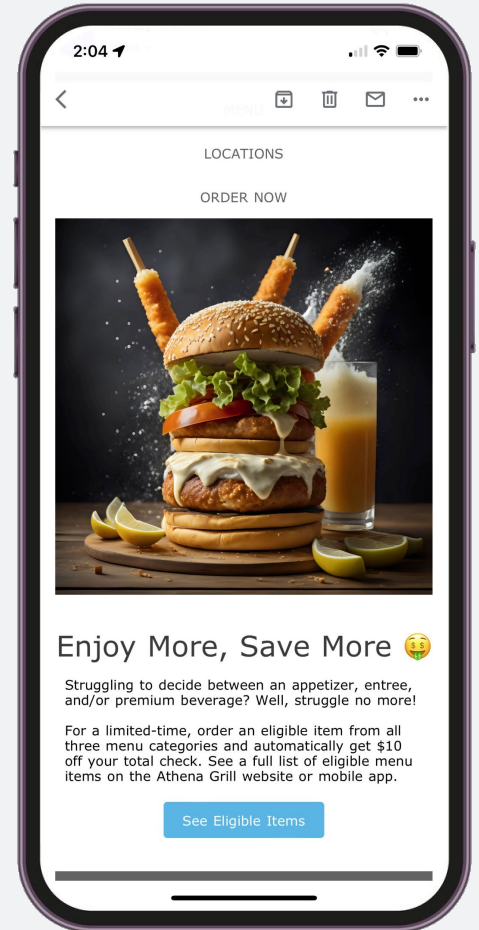
- Frequent visitor, low spender

## Why Automate

- Changing their purchase habits is the key to making them more profitable guests

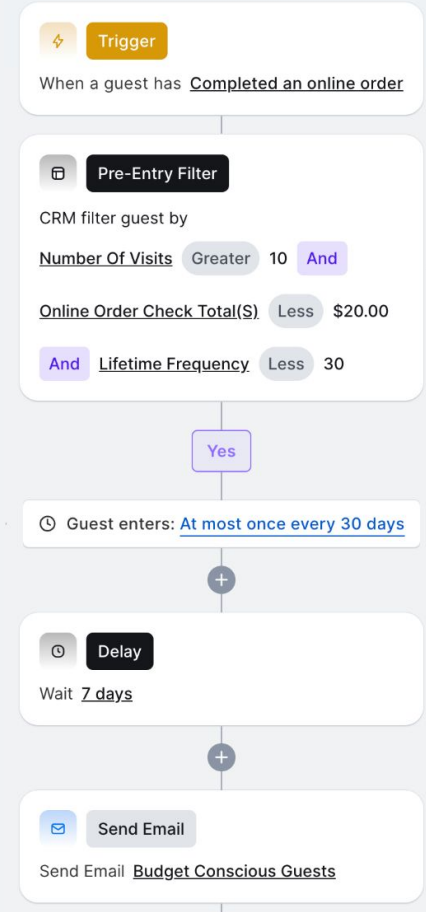
## Considerations

- Customize the *Check Prices* value based on your menu and test different price thresholds



# Automate: Upselling Budget-Conscious Guests

	On-Premise	Off-Premise
Trigger	When a guest has <u>Party Seated</u>	When a guest has <u>Completed an Online Order</u>
Pre-Entry Filter	CRM filter guest by <u>Number of Visits Greater 10</u> AND <u>Check Prices Less \$20</u> AND <u>Lifetime Frequency Less 30</u>	CRM filter guest by <u>Number of Visits Greater 10</u> AND <u>Online Order Check Total(s) Less \$20</u> AND <u>Lifetime Frequency Less 30</u>
Entry Recurrence	At most once every <u>30</u> days	
Time Delay	Wait <u>7</u> days	
If/Then Logic	<i>(None)</i>	
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> Optional</li> <li>● <b>Loyalty:</b> No</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> N/A</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> No</li> </ul>



# Automate: Upselling Budget-Conscious Guests - [Advanced](#)

	On-Premise	Off-Premise	On & Off-Prem Combination
Trigger	When a guest has <u>Party Seated</u>	When a guest has <u>Completed an Online Order</u>	When a guest has <u>Visited</u>
Pre-Entry Filter	CRM filter guest by <u>Computed Property Count of Party Seated Greater 10 AND Check Prices Less \$20 AND Time Of Last Visit Within Last 30 Days</u>	CRM filter guest by <u>Computed Property Count of Online Orders Greater 10 AND Online Check Total(s) Less \$20 AND Time Of Last Visit Within Last 30 Days</u>	<b>Segment</b> filter guest by <u>Number of Visits Greater 10 AND Time of Last Visit Within Last 30 Days</u>  <b>CRM</b> filter guest on <u>Online Check Total(s) Less \$20 OR Check Prices Less \$20</u>
Entry Recurrence	At most once every <u>30</u> days		
Time Delay	Wait <u>Z</u> days		
If/Then Logic	<i>(None)</i>		
Action	Send Email or SMS/MMS		
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> Optional</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> N/A</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> N/A</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> Optional</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> Optional</li> </ul>

# Automate: Upselling Budget-Conscious Guests – [Payment Processor Integrated](#)

	On-Premise	Off-Premise	On & Off-Prem Combination
Trigger	When a guest has <u>Party Seated</u>	When a guest has <u>Completed an Online Order</u>	When a guest has <u>Visited</u>
Pre-Entry Filter	CRM filter guest by <u>Total Card Swipes Greater 10 AND Check Prices Less \$20 AND Days Since Last Card Swipe Less 30 Days</u>	CRM filter guest by <u>Total Card Swipes Greater 10 AND Online Order Check Total(s) Less \$20 AND Days Since Last Card Swipe Less 30 Days</u>	<b>Segment</b> filter guest by <u>Total Card Swipes Greater 10 AND Days Since Last Card Swipe Less Last 30 Days</u>  <b>CRM</b> filter guest on <u>Online Check Total(s) Less \$20 OR Check Prices Less \$20</u>
Entry Recurrence	At most once every <u>30</u> days		
Time Delay	Wait <u>Z</u> days		
If/Then Logic	<i>(None)</i>		
Action	Send Email or SMS/MMS		
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> Yes</li> <li>● <b>WiFi:</b> Optional</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> N/A</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> Yes</li> <li>● <b>WiFi:</b> N/A</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> Optional</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> Yes</li> <li>● <b>WiFi:</b> Optional</li> </ul>

# Automate: Converting Quasi Regulars

Pique interest by featuring new menu items, sharing inspiring reviews, or providing an exclusive offer

## Goal

- Increase frequency and spend

## Guest Archetype

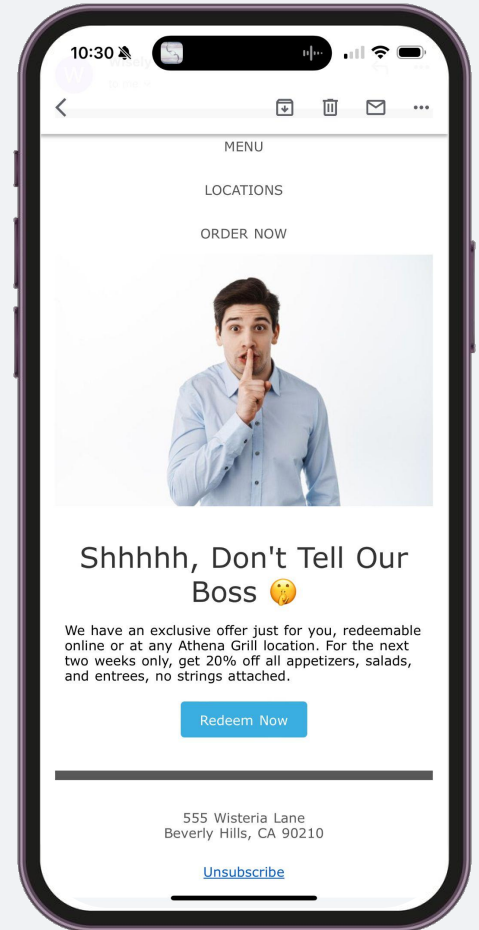
- Infrequent visitor, low spender

## Why Automate

- These guests are aware of your brand but need nudging to become valuable regulars

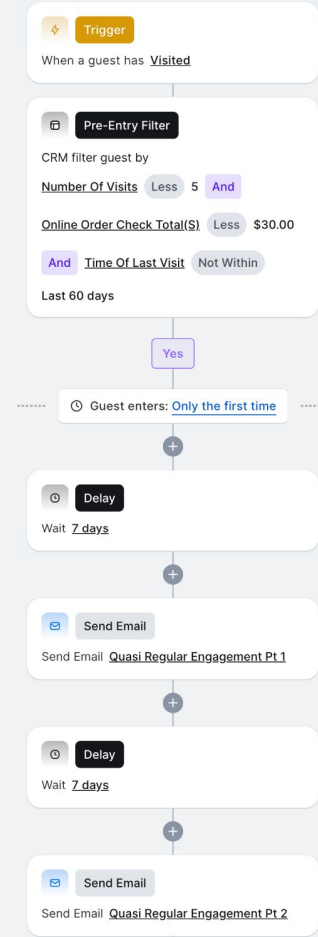
## Considerations

- Customize the *Number of Visits* and *Check Prices* values based on your business baselines



# Automate: Converting Quasi Regulars

	On-Premise	Off-Premise
Trigger	When a guest has <u>Visited</u>	
Pre-Entry Filter	CRM filter guest by <u>Number of Visits Less 5</u> AND <u>Check Prices Less \$30</u> AND <u>Time Of Last Visit Not Within Last 60 days</u>	CRM filter guest by <u>Number of Visits Less 5</u> AND <u>Online Order Check Total(s) Less \$30</u> AND <u>Time Of Last Visit Not Within Last 60 days</u>
Entry Recurrence	Only the first time	
Time Delay	Wait <u>7</u> days + Wait <u>7</u> days	
If/Then Logic	<i>(None)</i>	
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> Optional</li> <li>● <b>Loyalty:</b> No</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> N/A</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> No</li> </ul>



# Automate: Converting High-Potential Guests

Use post-visit messaging to establish a deeper guest connections and reinforce your brand value offering

## Goal

- Increase frequency

## Guest Archetype

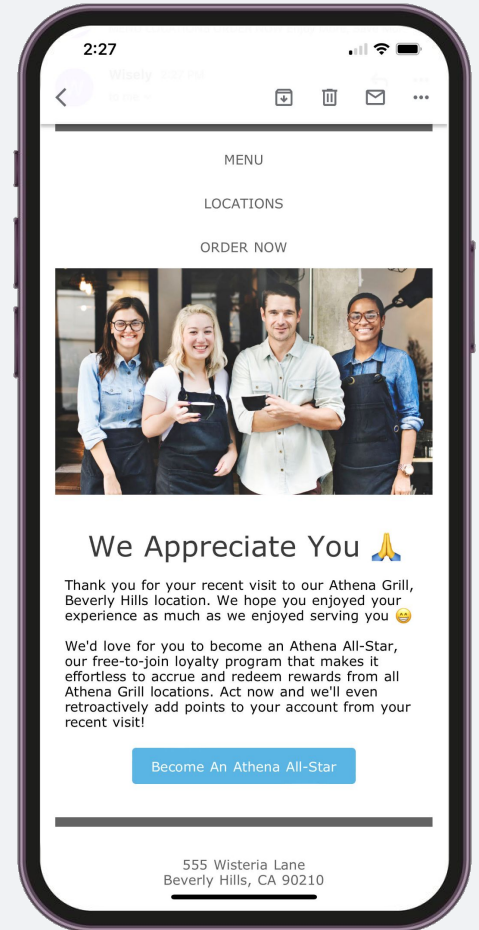
- Infrequent visitor, high spender

## Why Automate

- Big opportunity because these guests do not visit often but when they do, they spend big

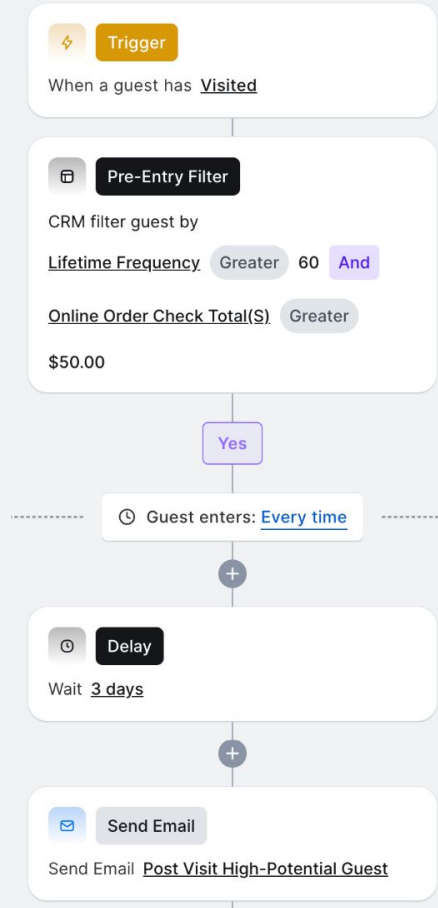
## Considerations

- Test different *Timing* values and message creative, upselling your rewards program (*if applicable*)



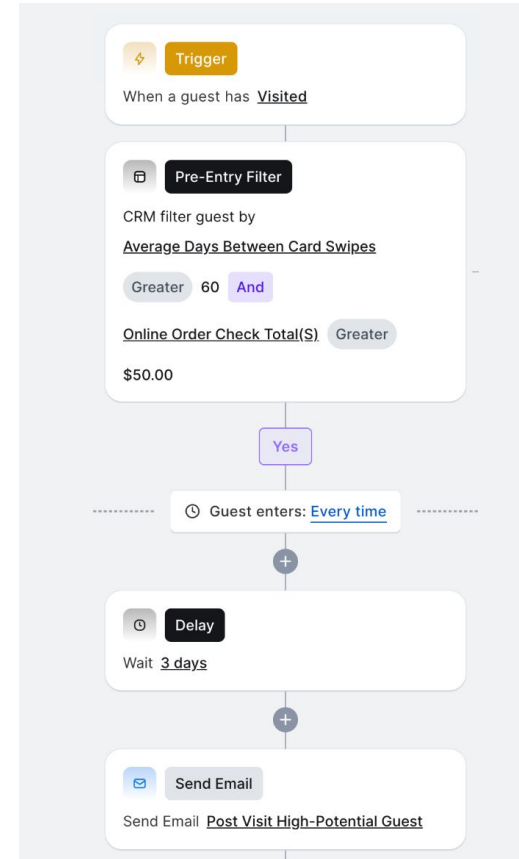
# Automate: Converting High-Potential Guests

	On-Premise	Off-Premise
Trigger	When a guest has <u>Visited</u>	
Pre-Entry Filter	CRM filter guests by <u>Lifetime Frequency</u> <i>Greater</i> 60 AND <u>Check Prices</u> <i>Greater</i> \$50	CRM filter guests by <u>Lifetime Frequency</u> <i>Greater</i> 60 AND <u>Online Order Check Total(s)</u> <i>Greater</i> \$50
Entry Recurrence	Every time	
Time Delay	Wait <u>3</u> days	
If/Then Logic	<i>(None)</i>	
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> Optional</li> <li>● <b>Loyalty:</b> No</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> N/A</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> No</li> </ul>



# Automate: Converting High-Potential Guests – [Payment Processor Integrated](#)

	On-Premise	Off-Premise
Trigger	When a guest has <u>Visited</u>	
Pre-Entry Filter	CRM filter guests by <u>Average Days Between Card Swipes</u> <i>Greater 60</i> AND <u>Check Prices</u> <i>Greater \$50</i>	CRM filter guests by <u>Average Days Between Card Swipes</u> <i>Greater 60</i> AND <u>Online Order Check Total(s)</u> <i>Greater \$50</i>
Entry Recurrence	Every time	
Time Delay	Wait <u>3</u> days	
If/Then Logic	<i>(None)</i>	
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> Yes</li> <li>● <b>WiFi:</b> Optional</li> <li>● <b>Loyalty:</b> No</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> N/A</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> Yes</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> No</li> </ul>



# Automate: Retaining High-Spend New Guests

Nurture first-timers with a survey and send them an offer to entice them back for a second visit

## Goal

- > Increase frequency

## Guest Archetype

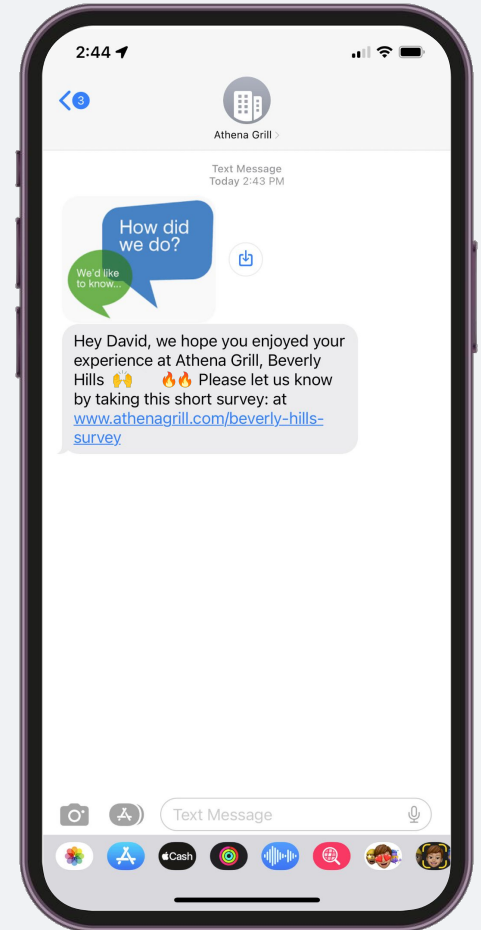
- > Infrequent visitor, high spender

## Why Automate

- > These guests are new to your brand but demonstrate potential to have high guest lifetime value

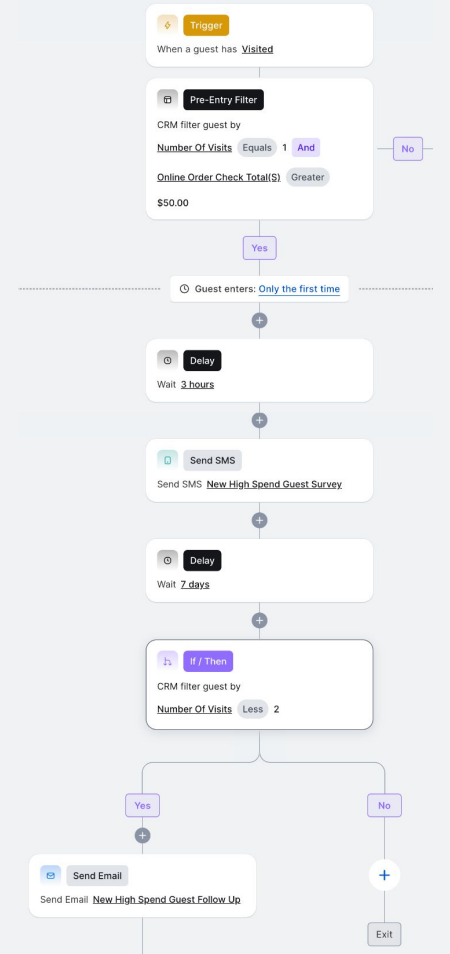
## Considerations

- > The *If/Then* and *Time Delay* values work together to send a message if the guest has not yet returned



# Automate: Retaining High-Spend New Guests

	On-Premise	Off-Premise
Trigger	When a guest has <u>Visited</u>	
Pre-Entry Filter	CRM filter guests by <u>Number of Visits Equals 1</u> AND <u>Check Prices Greater \$50</u>	CRM filter guests by <u>Number of Visits Equals 1</u> AND <u>Online Order Check Total(s) Greater \$50</u>
Entry Recurrence	Only the first time	
Time Delay	Wait <u>3</u> hours + <u>7</u> days + <u>14</u> days	
If/Then Logic	CRM filter guest by <u>Number of Visits Less 2</u>	
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> Optional</li> <li>● <b>Loyalty:</b> No</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> N/A</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> No</li> </ul>



# Automate: New Guest Welcome Series

Introduce your brand and persuade guests to become regulars by showing all you have to offer

## Goal

- Increase frequency and retention

## Guest Archetype

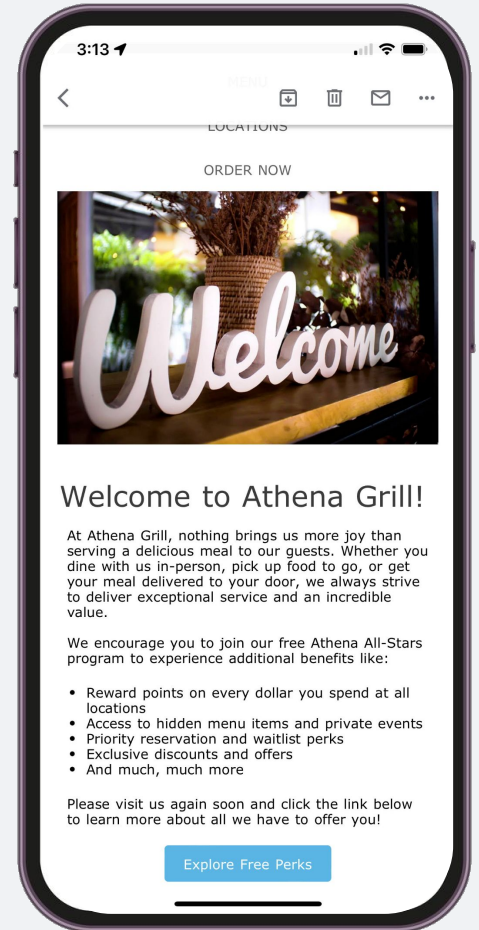
- New guest

## Why Automate

- Opportunity to influence behavior from the start and maximize their guest lifetime value

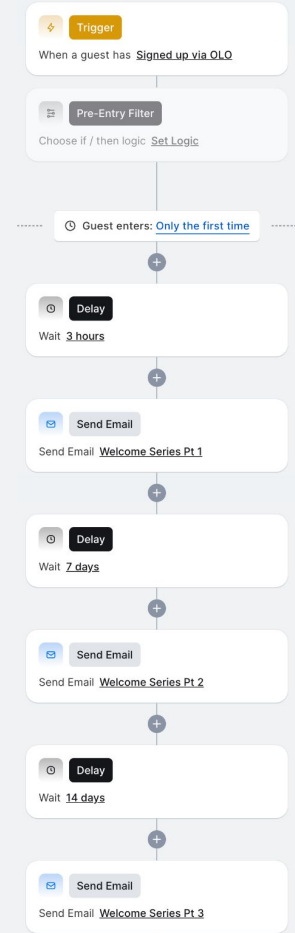
## Considerations

- Think about how your brand content can be sequenced over multiple emails or text messages



# Automate: New Guest Welcome Series

	On-Premise	Off-Premise
Trigger	When a guest has <u>Signed up via WiFi</u>	When a guest has <u>Signed up via OLO</u>
Pre-Entry Filter	(None)	(None)
Entry Recurrence	Only the first time	
Time Delay	Wait <u>3</u> hours + <u>7</u> days + <u>14</u> days	
If/Then Logic	CRM filter guest by <u>Number of Visits</u> <i>Does Not Equal 2</i>	
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> N/A</li> <li>● <b>POS:</b> N/A</li> <li>● <b>Online Order:</b> N/A</li> <li>● <b>Payment Processor:</b> N/A</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> N/A</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> N/A</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> No</li> </ul>



# Automate: Guest Birthday Campaigns

Surprise and delight guests with a personalized birthday message and special redeemable treat

## Goal

- > Improve retention

## Guest Archetype

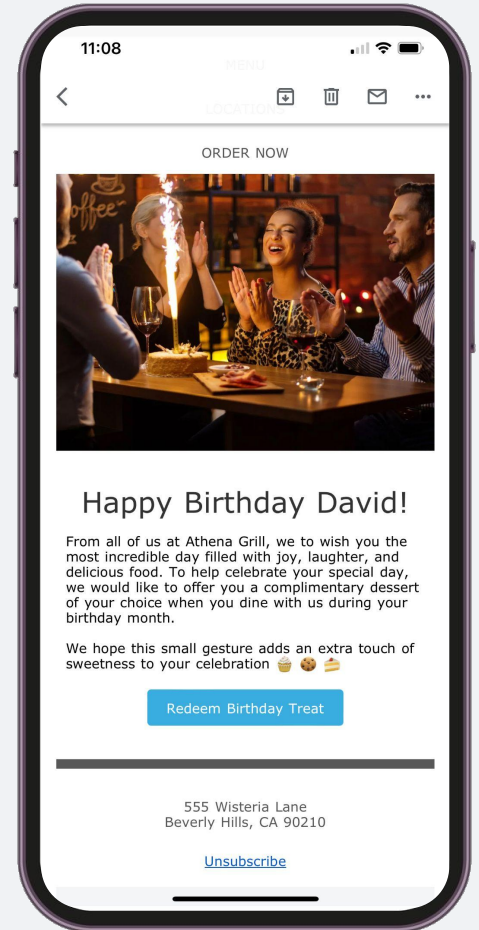
- > Varies

## Why Automate

- > Birthday campaigns help deepen the guest/brand relationship and have above average engagement

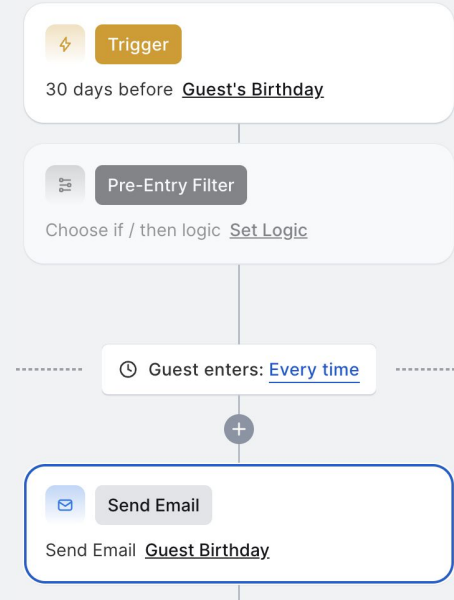
## Considerations

- > Adjust the number of days in the *Trigger* or add a *Pre-Entry Filter* to target specific Segments



# Automate: Guest Birthday Campaigns

	On-Premise	Off-Premise
Trigger	30 days before <u>Guest's Birthday</u>	
Pre-Entry Filter	(None)	(None)
Entry Recurrence	Every time	
Time Delay	(None)	
If/Then Logic	(None)	(None)
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> No</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> No</li> <li>● <b>Loyalty:</b> No</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> No</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> No</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> No</li> <li>● <b>Loyalty:</b> No</li> <li>● <b>Web Opt-In Form:</b> Optional</li> </ul>



# Automate: Guest Anniversary Campaigns

Incentivize guests to celebrate their special occasion at your restaurant with a special offer

## Goal

- > Improve retention

## Guest Archetype

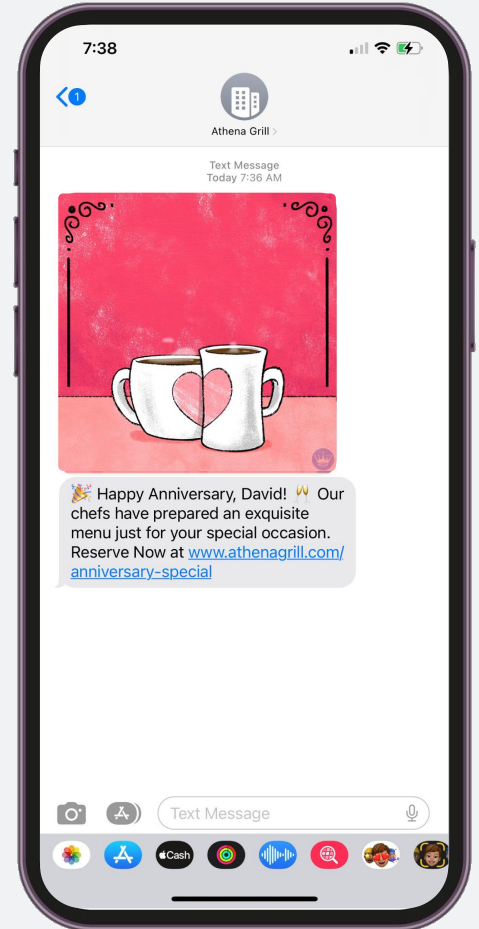
- > Varies

## Why Automate

- > Stay top of mind for special events and drive reservations with a 'Reserve Now' CTA

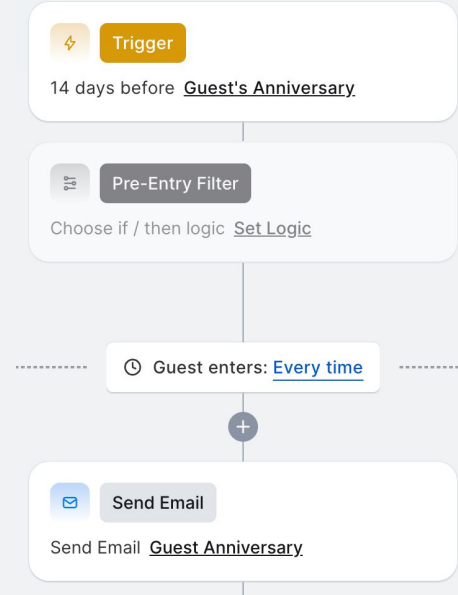
## Considerations

- > This can also be used as an 'anniversary' of joining your loyalty or other branded program



# Automate: Guest Anniversary Campaigns

	On-Premise	Off-Premise
Trigger	14 days before <u>Guest's Anniversary</u>	
Pre-Entry Filter	(None)	(None)
Entry Recurrence	Every time	
Time Delay	(None)	
If/Then Logic	(None)	(None)
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>• <b>Host:</b> No</li> <li>• <b>POS:</b> No</li> <li>• <b>Online Order:</b> No</li> <li>• <b>Payment Processor:</b> No</li> <li>• <b>WiFi:</b> No</li> <li>• <b>Loyalty:</b> Optional</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Host:</b> No</li> <li>• <b>POS:</b> No</li> <li>• <b>Online Order:</b> No</li> <li>• <b>Payment Processor:</b> No</li> <li>• <b>WiFi:</b> No</li> <li>• <b>Loyalty:</b> Optional</li> </ul>



# Automate: Post-Online Order Surveys

Proactively engage digital guests to amplify brand advocates and fix issues before they impact sales

## Goal

- > Guest feedback

## Guest Archetype

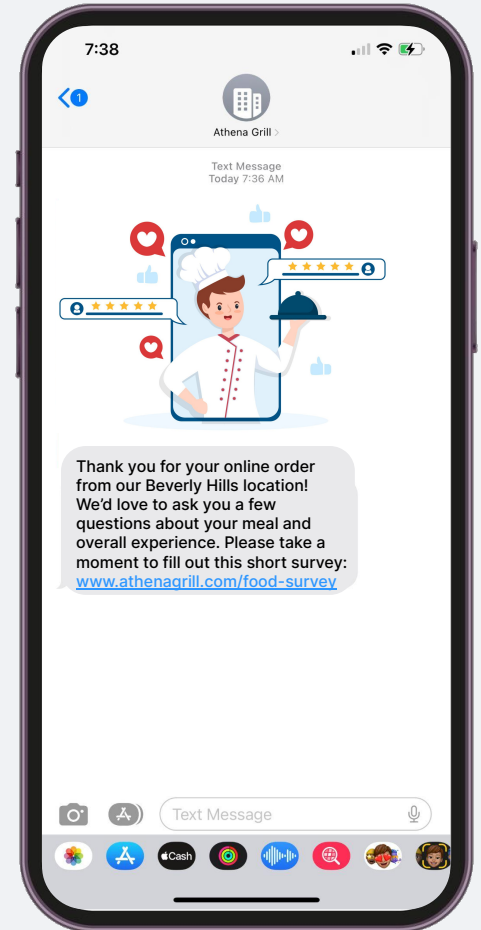
- > Varies

## Why Automate

- > Identify what is causing positive and negative brand experiences to optimize your operations

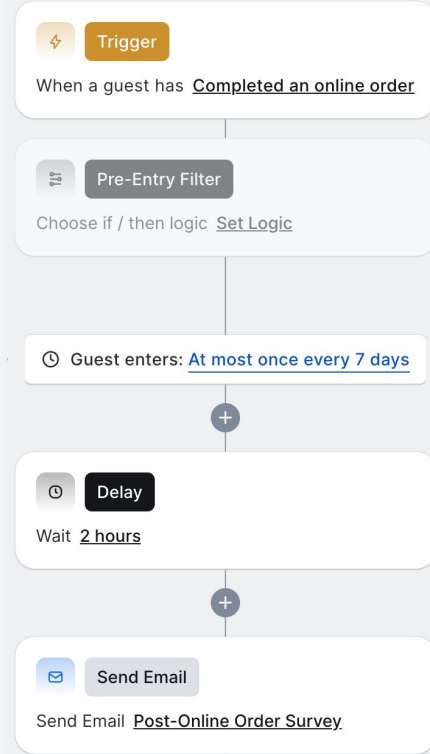
## Considerations

- > Asks guests who provide positive feedback in surveys to share their experiences on review sites



# Automate: Post-Online Order Surveys

	On-Premise	Off-Premise
Trigger	When a guest has <u>Completed an online order</u>	
Pre-Entry Filter	N/A	(None)
Entry Recurrence	At most once every <u>7</u> days	
Time Delay	Wait <u>2</u> hours	
If/Then Logic	N/A	(None)
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>• <b>Host:</b> N/A</li> <li>• <b>POS:</b> N/A</li> <li>• <b>Online Order:</b> N/A</li> <li>• <b>Payment Processor:</b> N/A</li> <li>• <b>WiFi:</b> N/A</li> <li>• <b>Loyalty:</b> N/A</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Host:</b> No</li> <li>• <b>POS:</b> No</li> <li>• <b>Online Order:</b> Yes</li> <li>• <b>Payment Processor:</b> No</li> <li>• <b>WiFi:</b> No</li> <li>• <b>Loyalty:</b> No</li> </ul>



# Automate: Item-Specific Satisfaction Surveys

Get real-time feedback on new, seasonal, or existing items to inform and optimize your menu

Goal

- > Guest feedback

Guest Archetype

- > Varies

Why Automate

- > Understanding what drives guests to trade up or down items is key to increasing margins

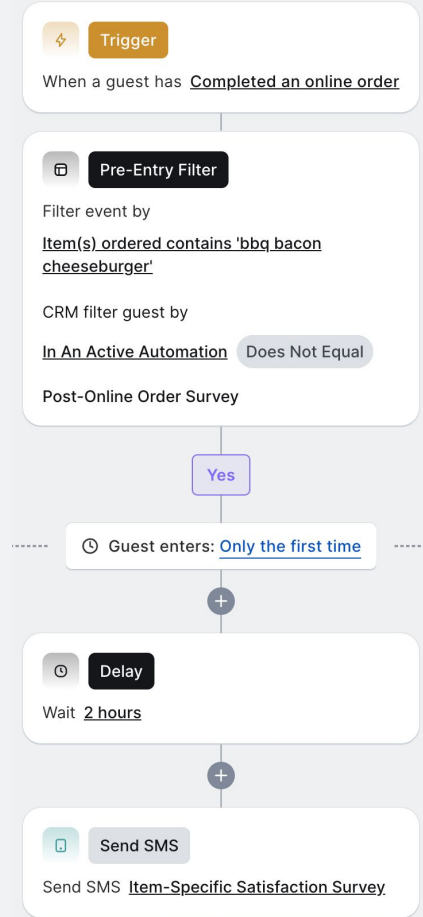
Considerations

- > Make sure the pre-entry filter is specific to the exact menu item name ('bbq bacon cheeseburger' vs. 'burger')



# Automate: Item-Specific Satisfaction Surveys

	On-Premise	Off-Premise
Trigger	When a guest has <u>Completed an Online Order</u>	
Pre-Entry Filter	N/A	<b>Event</b> filter by <u>Item(s) ordered Contains [Item Name] AND In an Active Automation Does Not Equal [Survey Name]</u>
Entry Recurrence	Only the first time	
Time Delay	Wait <u>2</u> hours	
If/Then Logic	(None)	(None)
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>• <b>Host:</b> N/A</li> <li>• <b>POS:</b> N/A</li> <li>• <b>Online Order:</b> N/A</li> <li>• <b>Payment Processor:</b> N/A</li> <li>• <b>WiFi:</b> N/A</li> <li>• <b>Loyalty:</b> N/A</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Host:</b> No</li> <li>• <b>POS:</b> No</li> <li>• <b>Online Order:</b> Yes</li> <li>• <b>Payment Processor:</b> No</li> <li>• <b>WiFi:</b> N/A</li> <li>• <b>Loyalty:</b> No</li> </ul>



# Automate: Post-Visit Surveys

Solicit feedback from on-premise guests to learn how your operations impacts guest favorability

## Goal

- > Guest feedback

## Guest Archetype

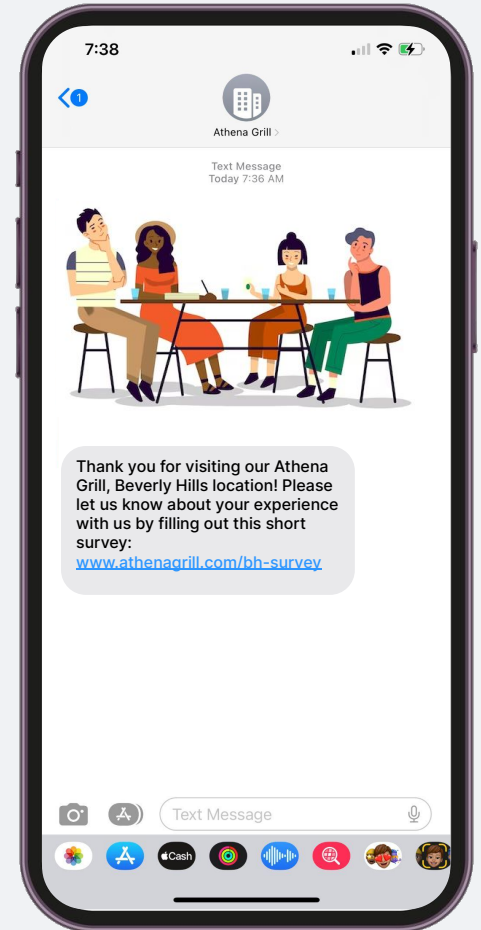
- > Varies

## Why Automate

- > Intercept negative feedback to win-back unhappy guests and prevent churn in real time

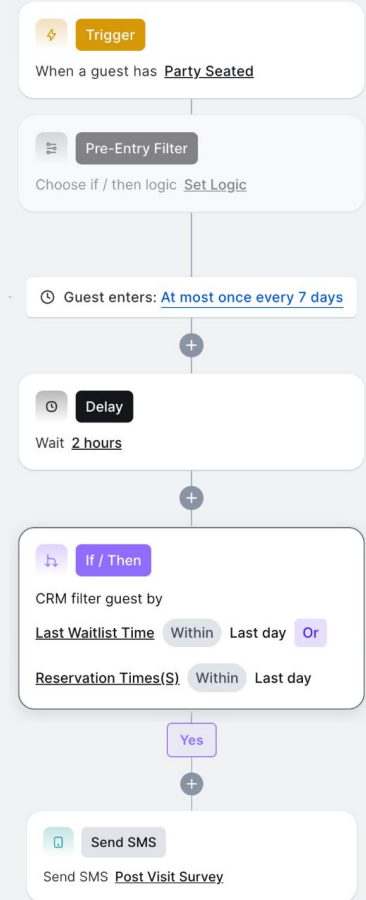
## Considerations

- > Various aspects of the guest experience like food quality, service, and likelihood to return



# Automate: Post-Visit Surveys

	On-Premise	Off-Premise
Trigger	When a guest has <u>Party Seated</u>	N/A
Pre-Entry Filter	(None)	N/A
Entry Recurrence	At most once every <u>7</u> days	
Time Delay	Wait <u>2</u> hours	
If/Then Logic	CRM filter guest by <u>Last Waitlist Time</u> <i>Within</i> Last day OR <u>Reservation Times(S)</u> <i>Within</i> Last day	N/A
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>• <b>Host:</b> Yes</li> <li>• <b>POS:</b> Yes</li> <li>• <b>Online Order:</b> No</li> <li>• <b>Payment Processor:</b> N/A</li> <li>• <b>WiFi:</b> Optional</li> <li>• <b>Loyalty:</b> N/A</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Host:</b> N/A</li> <li>• <b>POS:</b> N/A</li> <li>• <b>Online Order:</b> N/A</li> <li>• <b>Payment Processor:</b> N/A</li> <li>• <b>WiFi:</b> N/A</li> <li>• <b>Loyalty:</b> N/A</li> </ul>



# Automate: 'You May Also Like' Upselling

Recommend new or different menu items to guests based on their order history

Goal

- > Increase spend

Guest Archetype

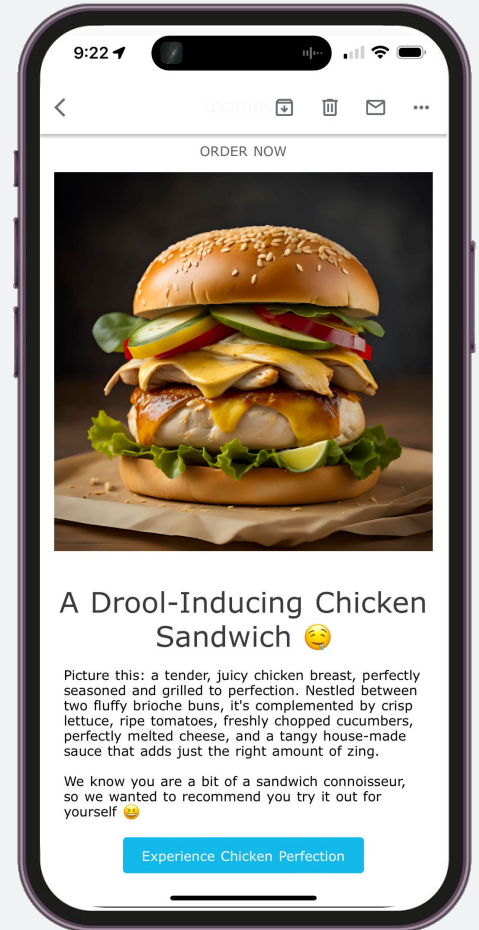
- > Varies

Why Automate

- > Increase margins by suggesting related premium items or recommending food pairings

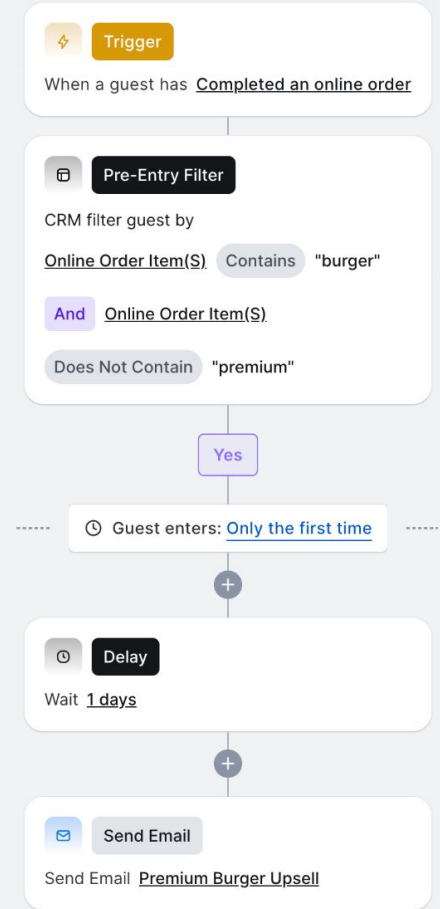
Considerations

- > When updating your menu, check active automations to avoid recommending unavailable items



# Automate: 'You May Also Like' Upselling

	On-Premise	Off-Premise
Trigger	When a guest has <u>Party Seated</u>	When a guest has <u>Completed an Online Order</u>
Pre-Entry Filter	Filter event by <u>Ordered Item(s) Contains</u> [Item Name] AND <u>Ordered Item(s) Does Not Contain</u> [Item Name]	CRM Filter guest by <u>Online Ordered Items(s) Contains</u> [Item Name] AND <u>Online Ordered Items(s) Does Not Contain</u> [Item Name]
Entry Recurrence	Only the first time	
Time Delay	Wait <u>1</u> days	
If/Then Logic	N/A	(None)
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>● <b>Host:</b> Yes</li> <li>● <b>POS:</b> Yes</li> <li>● <b>Online Order:</b> N/A</li> <li>● <b>Payment Processor:</b> N/A</li> <li>● <b>WiFi:</b> Optional</li> <li>● <b>Loyalty:</b> N/A</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Host:</b> No</li> <li>● <b>POS:</b> No</li> <li>● <b>Online Order:</b> Yes</li> <li>● <b>Payment Processor:</b> No</li> <li>● <b>WiFi:</b> N/A</li> <li>● <b>Loyalty:</b> No</li> </ul>



# Automate: Getting Reviews From Happy Guests

Follow up with guests who submit positive survey feedback asking them to leave a review

Goal

> Guest feedback

Guest Archetype

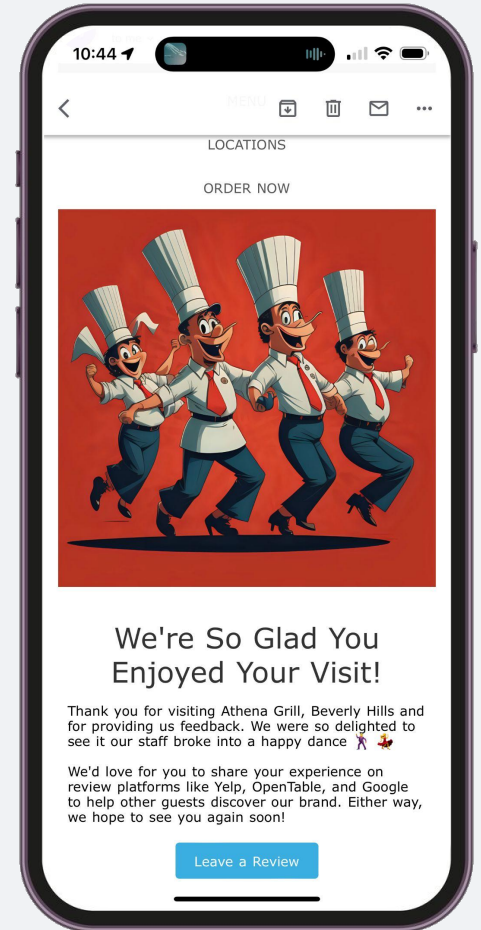
> Varies

Why Automate

> Turn satisfied guests into brand advocates to make review sites more reliable acquisition channels

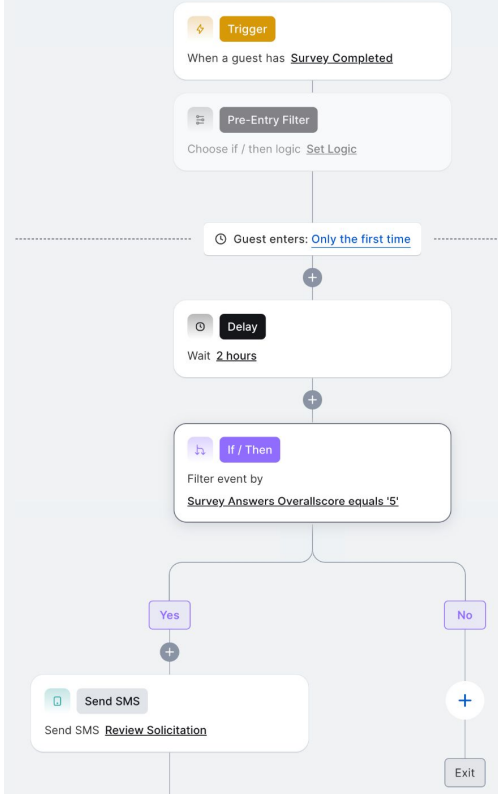
Considerations

> Automated follow ups can also be configured for guests who submit negative feedback via surveys



# Automate: Getting Reviews From Happy Guests

	On-Premise	Off-Premise
Trigger	When a guest has <u>Survey Completed</u>	
Pre-Entry Filter	<i>(None)</i>	
Entry Recurrence	Only the first time	
Time Delay	Wait <u>2</u> hours	
If/Then Logic	Filter event by <u>Surveys Answers Overallscore Equals 5</u>	
Action	Send Email or SMS/MMS	
Technical Requirements	<ul style="list-style-type: none"> <li>• <b>Host:</b> No</li> <li>• <b>POS:</b> No</li> <li>• <b>Online Order:</b> No</li> <li>• <b>Payment Processor:</b> No</li> <li>• <b>WiFi:</b> No</li> <li>• <b>Loyalty:</b> No</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Host:</b> No</li> <li>• <b>POS:</b> No</li> <li>• <b>Online Order:</b> No</li> <li>• <b>Payment Processor:</b> No</li> <li>• <b>WiFi:</b> No</li> <li>• <b>Loyalty:</b> No</li> </ul>





GDP



Marketing

Marketing Automations

## Next Steps

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No matter where you are on your marketing automations journey, Olo Engage can help you uplevel and scale your brand's personalized, one-to-one marketing program.

We encourage you to take advantage of the additional resources available in the [Engage Help Center](#) and to reach out to your Customer Success Manager for additional guidance and support on leveraging Marketing Automations for your specific needs.

## Additional Engage Resources

- [Segments: Attribute Names and Definitions](#)
- [Building, Editing, and Exporting Segments](#)
- [Suggested Segments & Use Cases](#)
- [Segments: Smart Properties and Predictive Analytics](#)
- [Marketing Automations Overview](#)
- [SMS/MMS Overview: Opt-Ins, Campaigns, and Automations](#)
- [Email Template Builder: Design and Code Editor](#)
- [Merge Tags and Dynamic Substitution Tags](#)
- [Introduction to Computed Properties](#)