Marketing Campaign User Guide

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Introduction

Marketing Campaign section in SmartOffice is a comprehensive solution for the design, execution, and management of marketing efforts. This campaign management system tracks details of campaigns and monitors the Leads and Opportunities generated through campaigns to give an indication of their effectiveness.

Navigation

From the SmartOffice side menu, click **Reporting/Marketing** and select **Marketing Campaign** to open the **Campaign Search** dialog box. The following search criteria are available: Campaign Name and Sponsored By.

Type in the appropriate search criteria and click the **Search** button to display all campaigns that match the criteria. For a complete list of campaigns, click the **Search** button with nothing in the fields.

To add a new campaign, click the **Add** button on the **Campaign Search** dialog box.

Campaign Summary

The Marketing Campaign Summary displays with the following functions:

- **Include Inactive Campaigns checkbox**: If this check box is checked, the Summary displays inactive campaigns with the active campaigns.
- **Add Button**: Click this button to add a new Campaign. When the Campaign Detail dialog box opens, add all appropriate details and click the **Save** button to save the Campaign.
- **Delete Button**: Tag a Campaign and click this button to delete the Campaign. System office Campaigns cannot be deleted by any other office. Locally created campaigns can be deleted or edited by a user in another office.
- **Tag all Button**: To perform an activity on all the displayed records, click this button to select all records without having to tag each individually. Click this button again to clear the selection.
- **Keep Tagged Rows Only Button**: To see only tagged campaigns on the Campaign Summary, tag the appropriate records and then click this button. Untagged Campaigns are removed from the Summary view.
- **Filter Button**: The function of this button is to display only those records that fulfill a filter condition.
- **UnFilter Button**: Click this button to remove the currently applied filter.
- **Print Spreadsheet**: Click this button to print the spreadsheet as displayed.
- **Customize Spreadsheet Layout**: This button allows the user to modify the layout of the spreadsheet by adding/removing columns, changing the sorting option, etc.

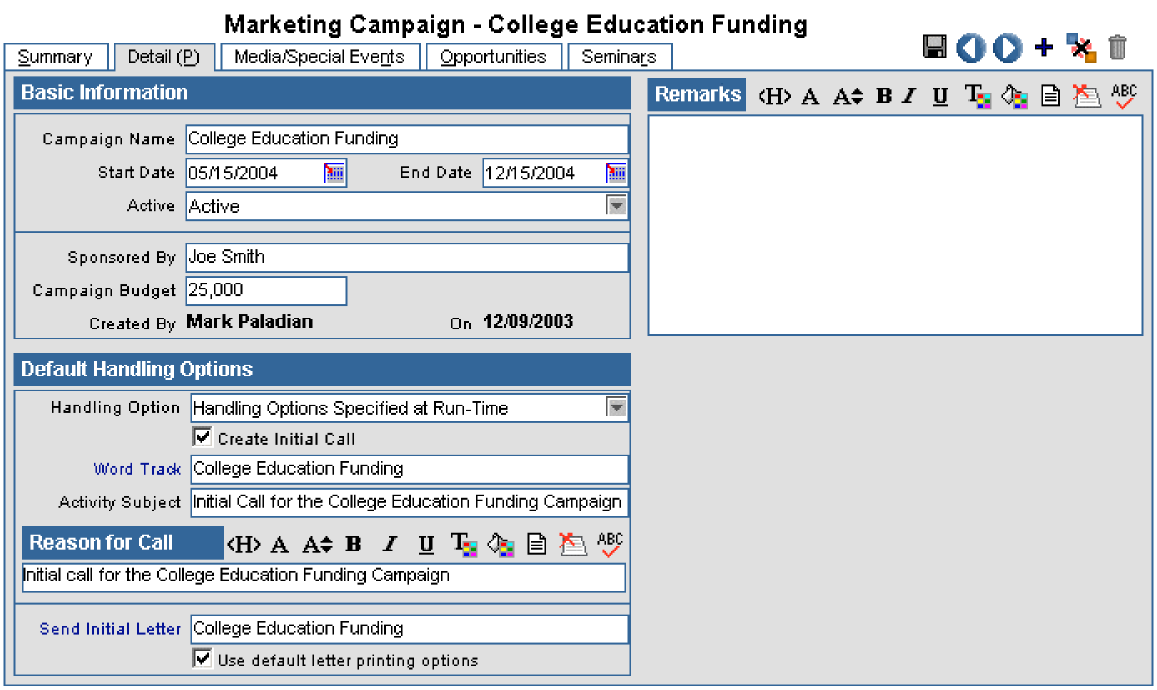
Detail tab and User Roles

Marketing Campaign is closely linked to the availability of Leads, Opportunity and Seminar Tracking licenses. For each campaign, the respective Leads, Opportunities and Seminars can be viewed if the current user has the respective roles and licenses for these modules.

The Marketing Campaign interface does change if one or more of these licenses and roles are not available to the current user:

- If the current user does not have a Seminar Tracking license, the Seminar tab is not displayed.
- If the current user does not have the Opportunity module role, the Opportunities tab is not displayed.
- If the current user does not have a Leads Tracking license, the Leads and Fulfillments tab is not displayed. See below for additional details.

Marketing Campaign without Leads User Roles and Licenses



The Detail tab displays with following sections:

Basic Information

Campaign Name - This mandatory field lists the Campaign's name.
Start Date – Enter the Campaign Start Date.
End Date - Enter the Campaign End Date.

Active - At any given time, a campaign can be either active or inactive. An Inactive campaign will display on the summary only when the **Include Inactive Campaigns** check box on the top left hand side corner is checked.
Sponsored By - Accepts the name of the campaign sponsor as a text input.
Campaign Budget – Enter the numerical budget figure into this field.
Created By – This read-only field notes the user who created the campaign

(Created) On – This read-only field notes the date when the campaign was created.

Default Handling Options

The Handling Options are regarding a Call and/or a Letter that can be defined at the Campaign level and executed for a Lead or an Opportunity that is linked to the Campaign. Handling Options streamline marketing efforts and enforce a common workflow for Leads/Opportunities/Contacts that are a part of one Campaign.

Handling Option - This drop-down list offers options on when and how to execute handling options for the campaign.

Create Initial Call - Tag this checkbox if the handling option is for a Call. When this option is selected, the following fields are displayed:

Word Track - Click this hyperlink to select a word track.

Activity Subject - The contents of this field are displayed in the respective field of the Activity Detail tab when the handling option is executed.

Reason for Call - The contents of this field are displayed in the respective field of the Activity Detail tab when the handling option is executed.

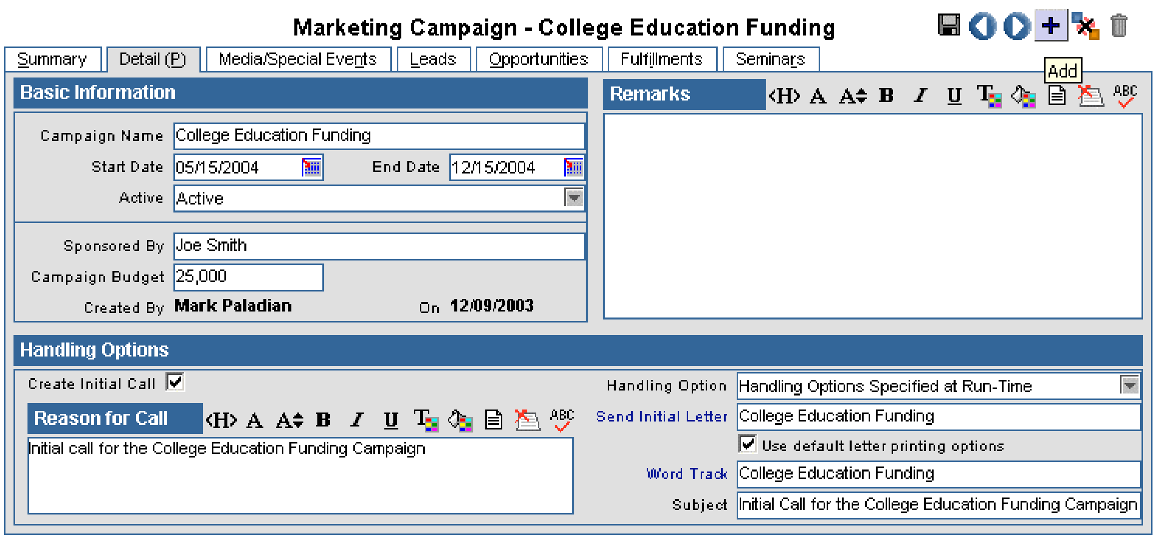
Send Initial Letter - Click this link to select a Letter to send when handling options are run.

Use Default Letter Printing options - If this option is checked, the Letter Printing Options from User Preferences are applied.

Remarks – Enter any pertinent information into this free form text field.

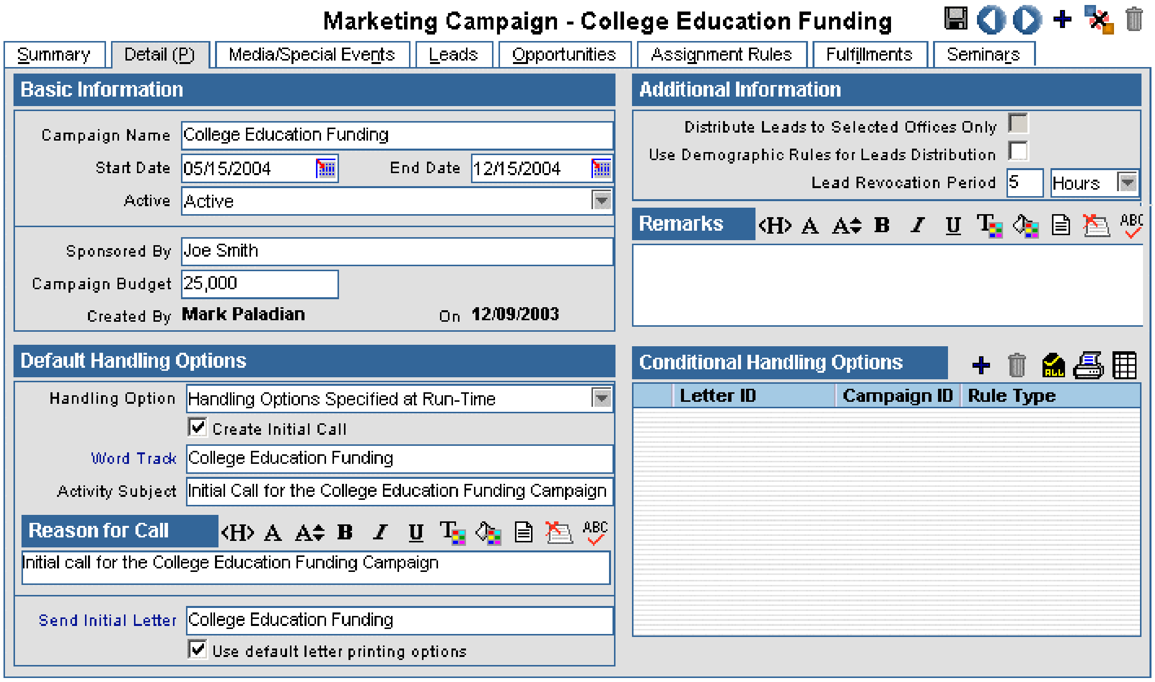
Marketing Campaign with Leads Advisor User Role

If the user is a Leads Advisor, the tabs Leads and Fulfillments are displayed. Campaign Detail has the following sections: Basic Information, Handling Options, Reason for Call and Remarks.



Marketing Campaign with Leads Coordinator User Role

For a Leads Coordinator, campaign-handling options are dealt with differently. An additional tab, Assignment Rules, is displayed. The Marketing Campaign Detail tab has the following sections: Basic Information, Default Handling Options, Reason for Call, Additional Information, Remarks and Conditional Handling Options.



Basic Information

Campaign Name - This mandatory field lists the Campaign's name.
Start Date – Enter the Campaign Start Date.
End Date – Enter the Campaign End Date.
Active - At any given time, a campaign can be either active or inactive. An Inactive campaign will display on the summary only when the **Include Inactive Campaigns** check box on the top left hand side corner is checked.
Sponsored By – Enter the name of the campaign sponsor into this field.
Campaign Budget- Accepts numerical budget figure
Created By – This read-only field notes the user who created the campaign

(Created) On – This read-only field notes the date when the campaign was created.

Default Handling Options

Handling Option - This drop-down list offers options on when and how to execute handling options for the campaign.

Create Initial Call - Tag this checkbox if the handling option is for a Call. When this option is selected, the following fields are displayed:

> **Word Track** - Click this hyperlink to select a word track.
>
> **Activity Subject** - The contents of this field are displayed in the respective field of the Activity Detail tab when the handling option is executed.
>
> **Reason for Call** - The contents of this field are displayed in the respective field of the Activity Detail tab when the handling option is executed.

Send Initial Letter - Click this link to select a Letter to send when handling options are run.

Use Default Letter Printing options – Check this option to apply the Letter Printing Options from User Preferences.

Remarks – Enter any pertinent information into this free form text field.

Additional Information

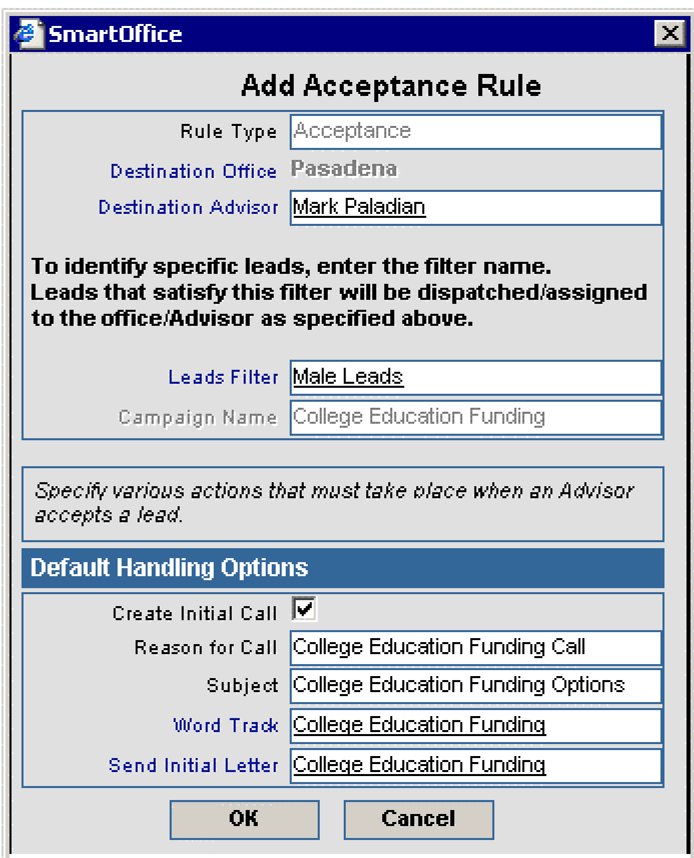
Distribute Leads to Selected Offices Only - This checkbox is used exclusively by Leads Administrator users and is disabled for all other users. When checked, it ensures that the leads linked to the campaign are sent only to those Advisors that are listed in the Participants/Advisors tab. This tab is also exclusive to Lead Administrator users.

Use Demographic Rules for Leads Distribution - When this option is selected, all leads linked to the Campaign are distributed to Offices based on the ZIP Code in the Demographic Rules.

Lead Revocation Period - After this period, all leads that belong to this Campaign begin to display in the Revocable leads spreadsheet.

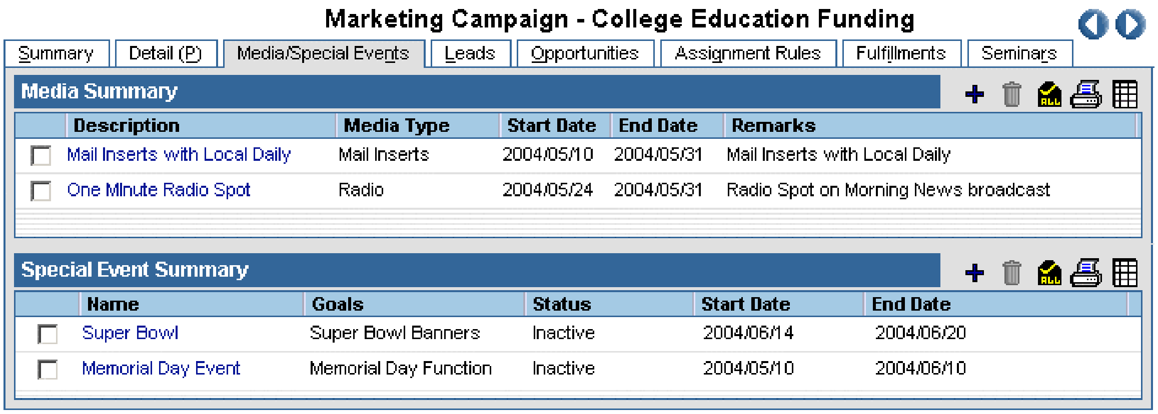
Conditional Handling Options

Conditional Handling Options allow the user to execute specific handling options for an Advisor based on a Filter. Like Default Handling Options, these are executed when the Advisor accepts a lead linked to the Campaign. The Conditional Handling Options will be executed only if the lead satisfies the Filter condition. To add conditional handling options, click the **Add** button.



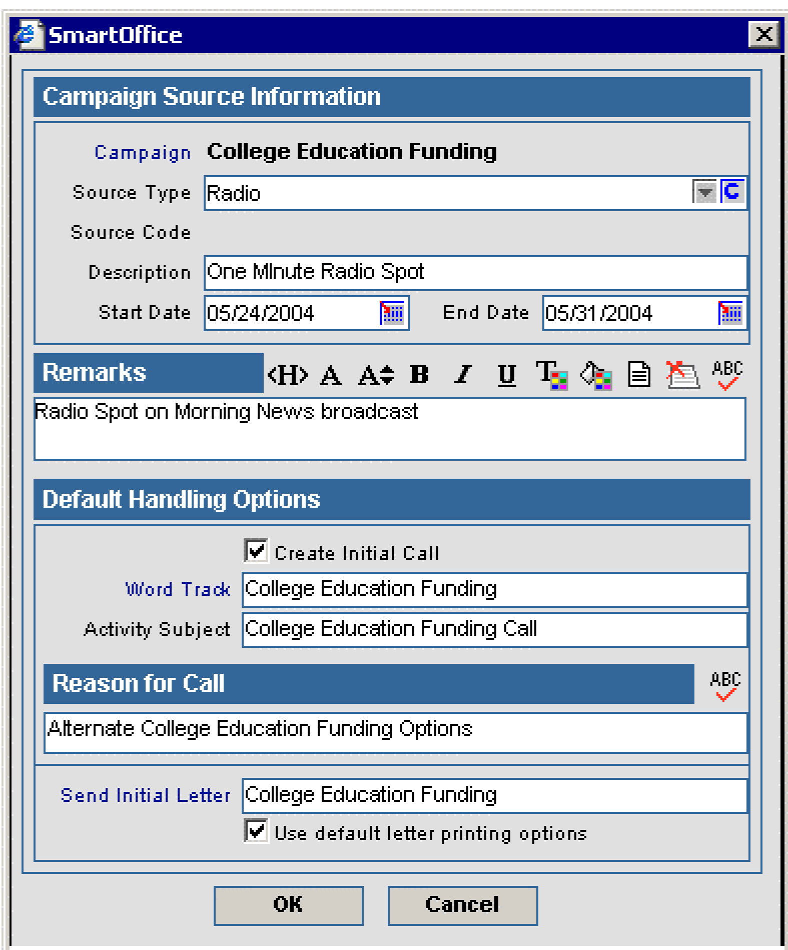
Use the hyperlinks to locate the appropriate **Destination Advisor** and **Filter**. Specify handling options in the section below. Conditional Handling Options override all other types of handling options defined at various points for a campaign. To execute these options, add a lead to this campaign. Ensure that it fulfills the filter condition and then assign it to the selected Advisor. When this Advisor accepts the lead, the letter and the call handling options are displayed in the new Opportunity created by accepting this lead.

Media Special Events Tab

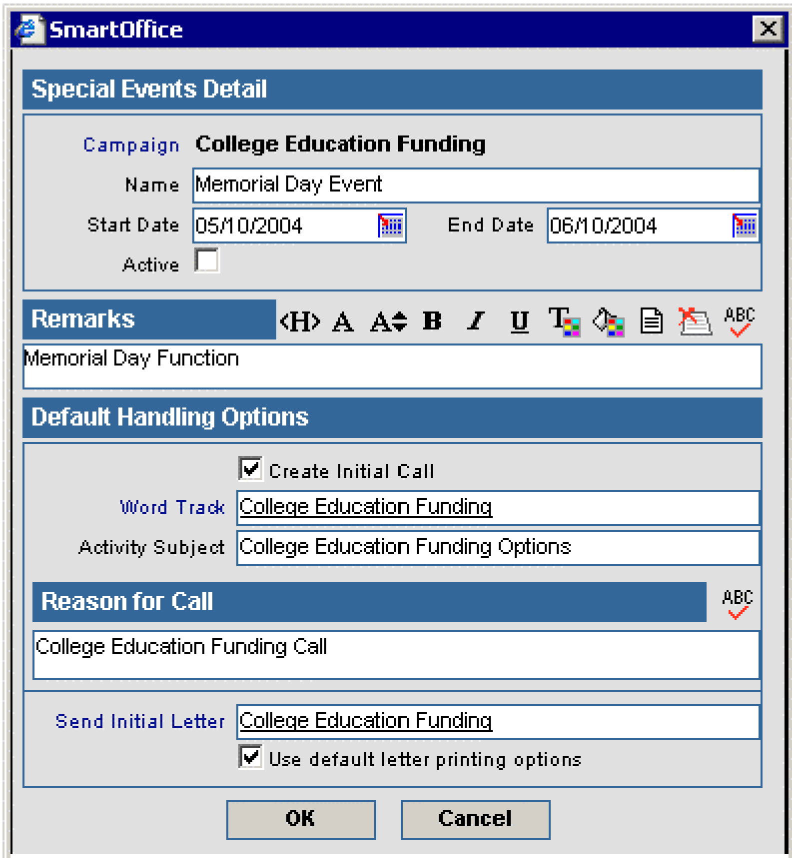


Within a Marketing Campaign, the sales efforts that target a specific media can be tracked at this tab in the **Media Summary**. Marketing attempts linked to certain special occasions can be listed in a separate **Special Events Summary**.

Add Media



Add Special Event



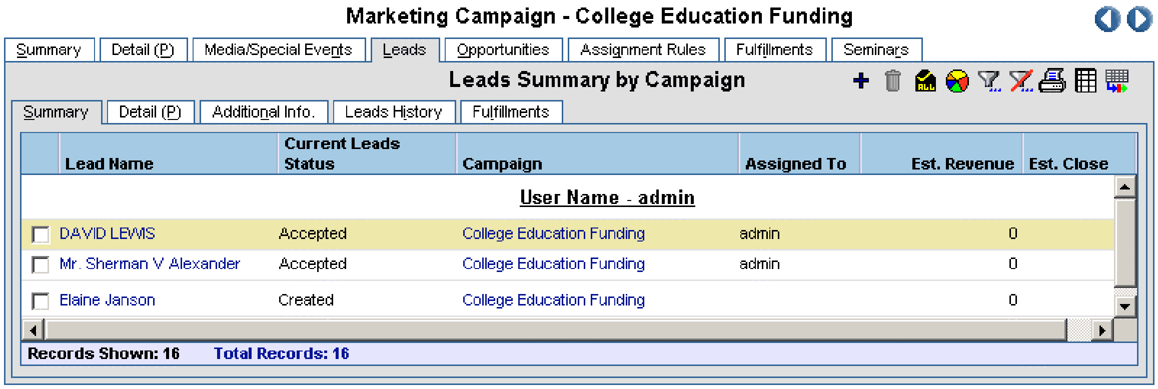
Handling Options can be linked to both Media and Special Events. For a Lead that is linked to this Campaign and the Media/Special Events, the respective handling options of the Media/Special Events are executed.

Order of Precedence in Handling Options

For a leads coordinator user, Handling Options can be defined at multiple points on the Campaign Detail tab, Media and Special Events tab. The order of precedence in which these handling options execute is as follows:

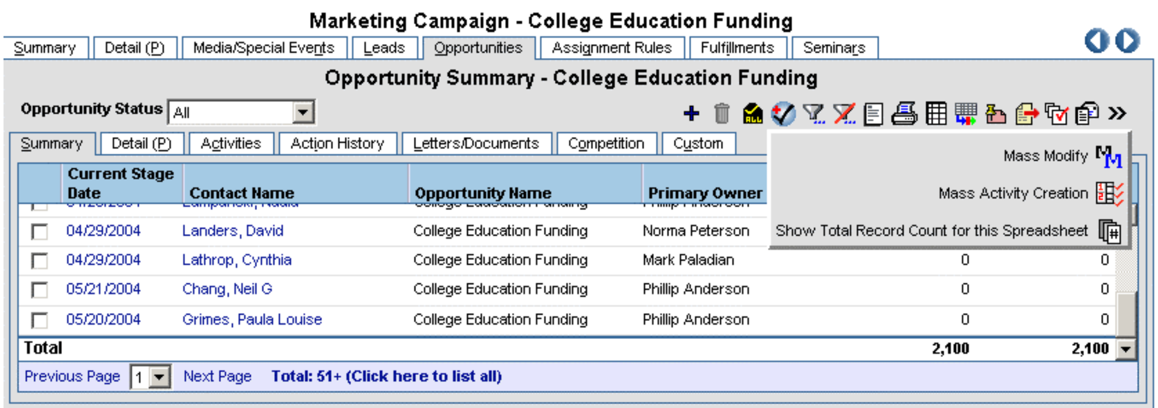
1. Conditional Handling Options on Detail tab
2. Handling Options linked to Media
3. Handling Options linked to Special Events
4. Default Handling Options on Detail tab

Leads



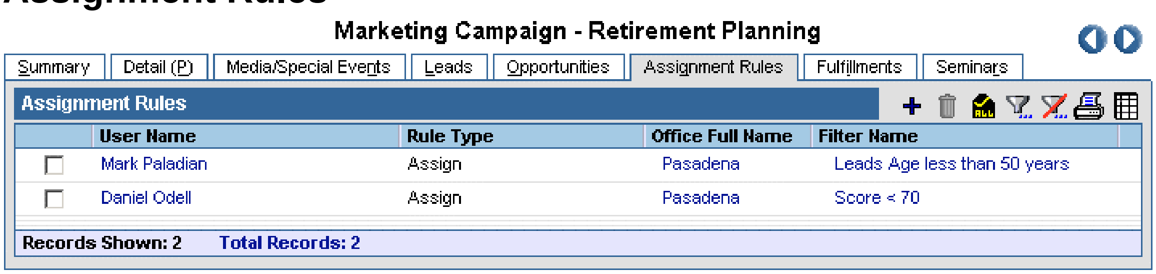
The Leads Tab is only viewable by users with a Leads Tracking license. This list includes leads that belong to a selected campaign. For a locally created campaign, new leads can be added to this tab. From this tab, leads can only be Added, Modified and Deleted. Specific leads functions like Assign, Reject, Accept, Revoke and Forward are not available.

Opportunities



The Opportunities Tab is only viewable by users with the Opportunity module role. Opportunities for a campaign can be viewed at this tab.

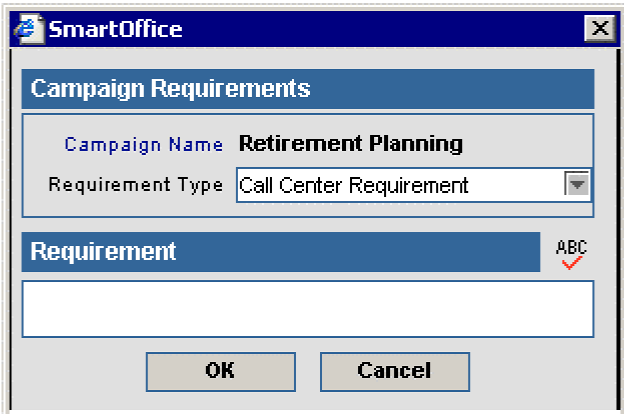
Assignment Rules



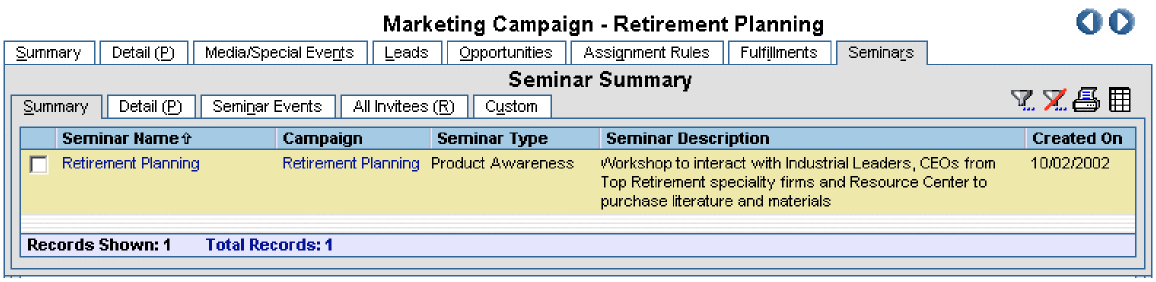
When an automatic Process is run, leads are assigned to individual Users based on filters identified in Assignment rules. This tab is only displayed for users with a Lead Tracking license.

Fulfillments

Call Center and Fulfillment center can be linked to Campaigns. This tab is only displayed for users with a Lead Tracking license.



Seminars



All Seminars that are linked to the selected campaign will be listed on this tab. This tab is only displayed for users with a Seminar Tracking license.

Marketing Campaign and Leads

The Marketing Campaigns interface is an important part of the Leads Tracking module.

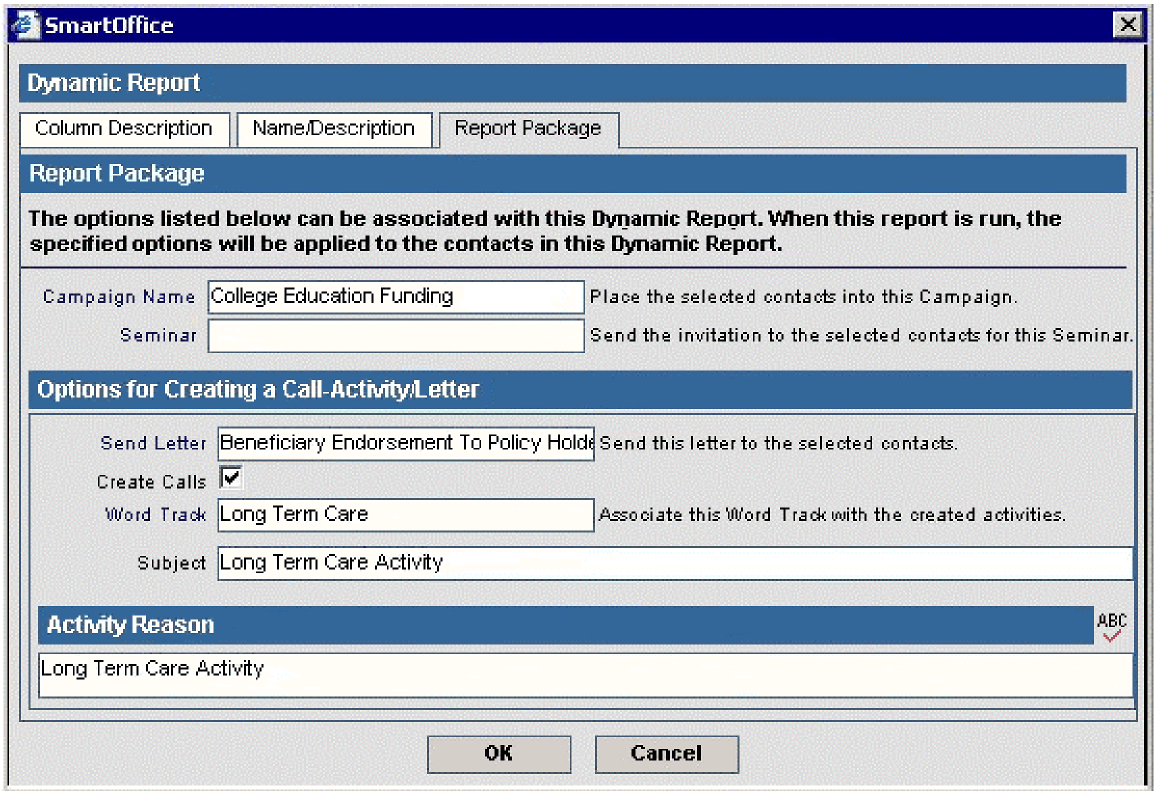
- The applicable Handling Options for a campaign execute when a lead is accepted and a corresponding Opportunity is created.
- The Assignment Rules tab at the Marketing Campaign level allows the user to define Assignment Rules applicable to leads linked to a specific Campaign.
- From the Leads Summary, multiple leads can be selected to mass modify Campaign. Leads can also be mass assigned to Campaigns when a leads import is run. At the end of the import, a Campaign can be selected from the drop down list. All imported leads will be linked to this campaign.

Marketing Campaign and Opportunities

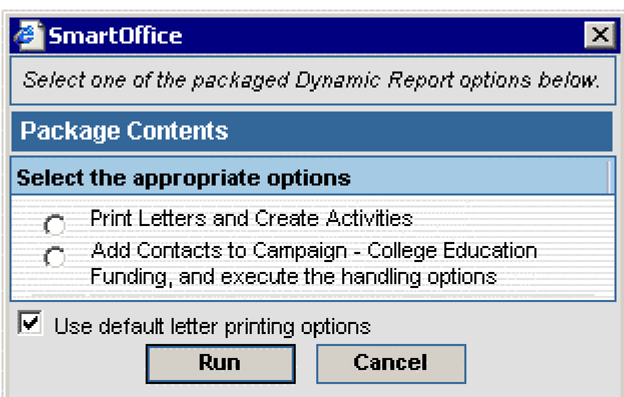
Default Campaign Handling Options execute from the Opportunity module when a new Opportunity is added with a campaign that has handling options. The Activity and Letter created as a part of the campaign handling options are saved in the Activities and Letters/Documents tabs respectively. The Activity Detail dialog box displays the Subject and Reason as recorded in the Handling Options. Other handling options include: Conditional, Media and Special Events handling options are not relevant to Opportunities.

Marketing Campaign in Dynamic Reports

Dynamic Reports can be linked to a Marketing Campaign through the Report Package tab.

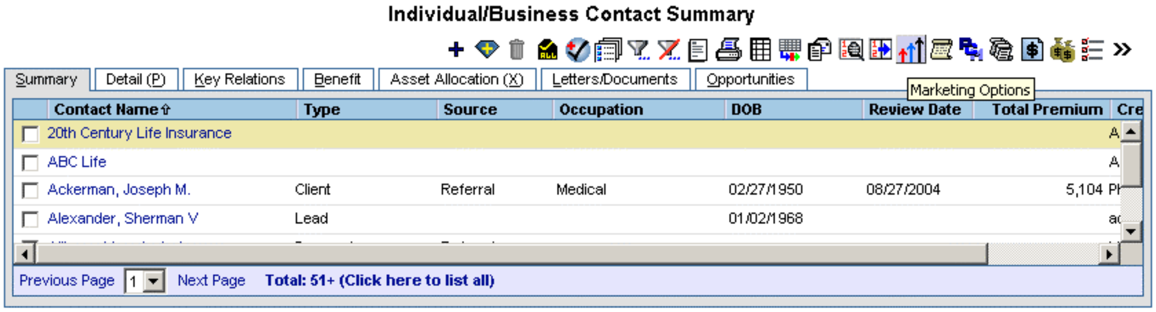


From this tab, **Packaged Options** can be defined for the Dynamic Report. Packaged Options can be Campaigns, Seminars, Letters and Activities. To run Packaged Options, after the report is executed, select a record and click the **Execute Packaged Options** button on the Dynamic Report toolbar.

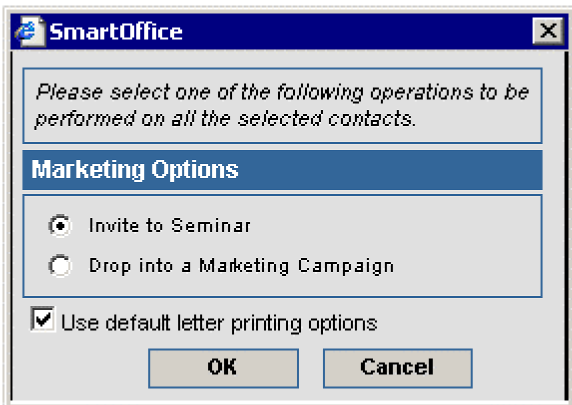


The **Package Contents** dialog box opens with the available options. When the **Add Contacts to Campaign** option is selected, an Opportunity is created with the Campaign and the handling options are executed.

Marketing Campaign as Marketing Options



Marketing Options, such as Seminars and Marketing Campaigns, can be defined and applied to selected contacts.



From the **Contact Summary**, tag a record and then click the **Marketing Options** button. On the **Marketing Options** dialog box, select the option **Drop into a Marketing Campaign**.

When the Campaign Search dialogue box opens, click the **Search** button and then select a campaign with handling options. For the selected contact, a new Opportunity is created and the campaign handling options are executed.