Marketing Campaign
User Guide

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Introduction

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

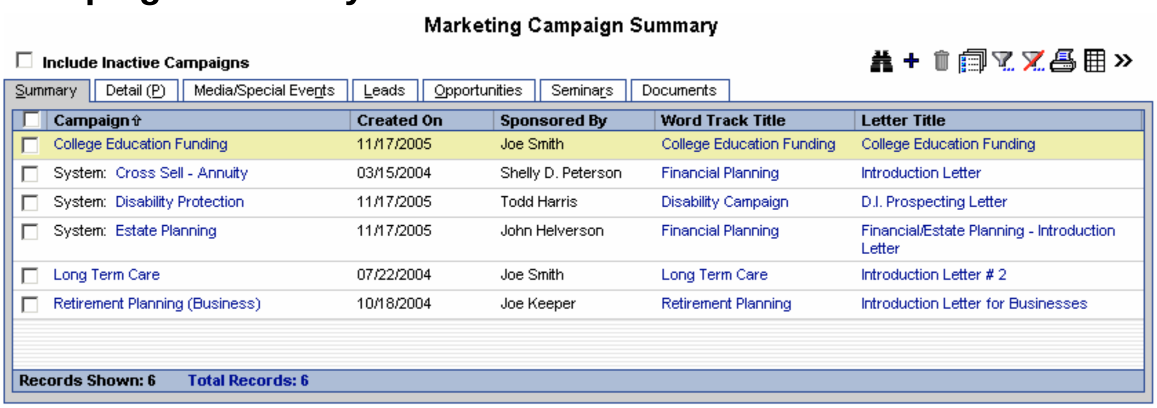
Navigation

From the SmartOffice side menu, click **Reporting/Marketing** and then 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 then click the **Search** button to display all campaigns that match the criteria. For a complete list of campaigns, click the **Search** button without entering any search criteria.

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

Campaign Summary



Campaign	Created On	Sponsored By	Word Track Title	Letter Title
College Education Funding	11/17/2005	Joe Smith	College Education Funding	College Education Funding
System: Cross Sell - Annuity	03/15/2004	Shelly D. Peterson	Financial Planning	Introduction Letter
System: Disability Protection	11/17/2005	Todd Harris	Disability Campaign	D.I. Prospecting Letter
System: Estate Planning	11/17/2005	John Helverson	Financial Planning	Financial/Estate Planning - Introduction Letter
Long Term Care	07/22/2004	Joe Smith	Long Term Care	Introduction Letter # 2
Retirement Planning (Business)	10/18/2004	Joe Keeper	Retirement Planning	Introduction Letter for Businesses

Records Shown: 6 Total Records: 6

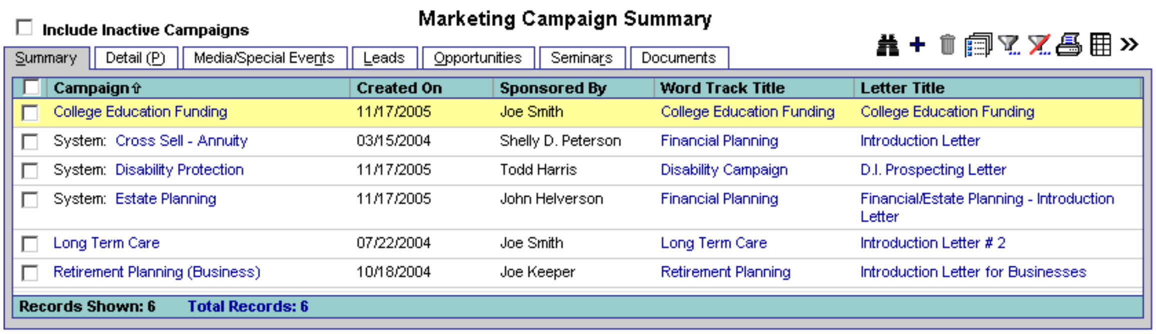
The Marketing Campaign Summary displays with the following functions:

- **Include Inactive Campaigns Option -** If this option is selected, the Summary displays inactive and active campaigns.
- **Search -** To Search the Campaign, click the **Search** button.
- **Add Button -** Click this button to add a new Campaign. When the Campaign Detail dialog box opens, add all appropriate details and then click the **Save** button to save the Campaign.
- **Delete Button -** Tag a Campaign and then click the **Delete** button to delete the Campaign. System Office Campaigns cannot be deleted by any other office. Locally created campaigns can be deleted or edited by users in other offices.
- **Keep Tagged Rows Only Button -** To see only tagged campaigns on the Campaign Summary, tag the appropriate records and then click the **Keep Tagged Rows Only** 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 enables the user to modify the layout of the spreadsheet by adding/removing columns, changing the sorting option, etc.

- **Tag All Option -** To perform an activity for all displayed records, select this option to select all records without having to tag each individually. Click the option again to clear the selection.

Detail Tab and User Roles

The Marketing Campaign feature 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.


Include Inactive Campaigns

Marketing Campaign Summary

Summary | Detail (P) | Media/Special Events | Leads | Opportunities | Seminars | Documents

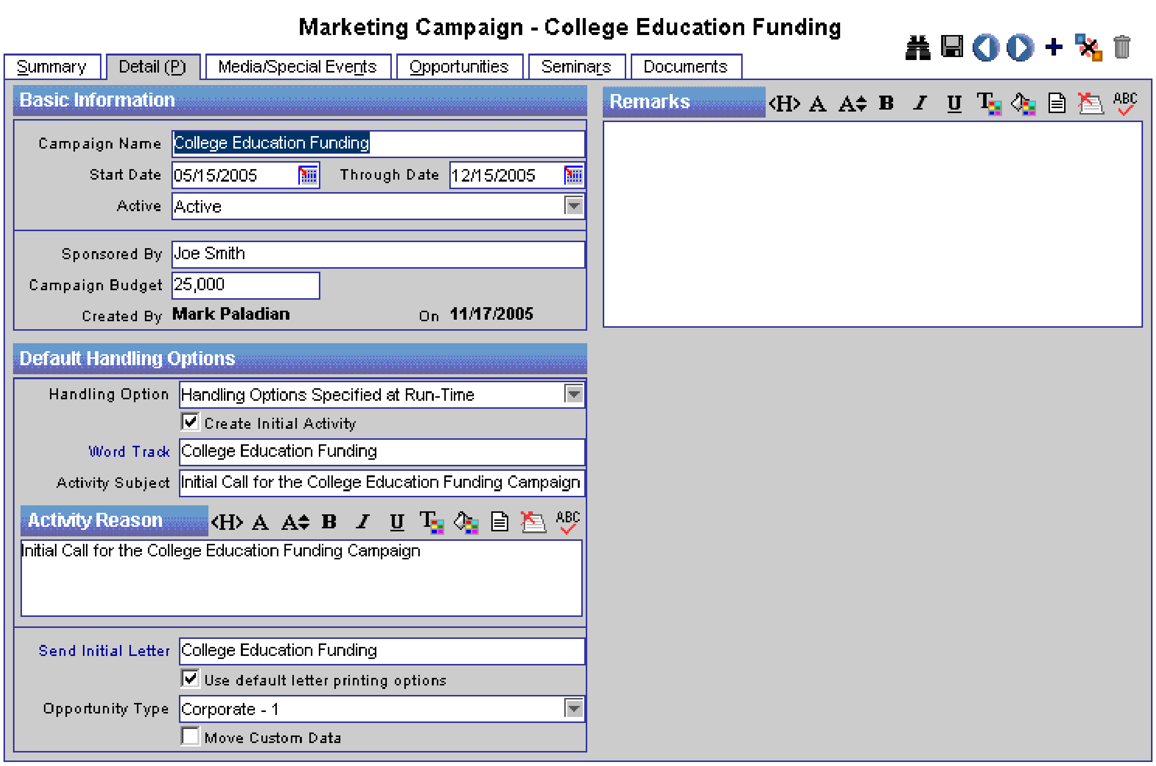
Campaign	Created On	Sponsored By	Word Track Title	Letter Title
College Education Funding	11/17/2005	Joe Smith	College Education Funding	College Education Funding
System: Cross Sell - Annuity	03/15/2004	Shelly D. Peterson	Financial Planning	Introduction Letter
System: Disability Protection	11/17/2005	Todd Harris	Disability Campaign	D.I. Prospecting Letter
System: Estate Planning	11/17/2005	John Helverson	Financial Planning	Financial/Estate Planning - Introduction Letter
Long Term Care	07/22/2004	Joe Smith	Long Term Care	Introduction Letter # 2
Retirement Planning (Business)	10/18/2004	Joe Keeper	Retirement Planning	Introduction Letter for Businesses

Records Shown: 6 Total Records: 6

The Marketing Campaign interface changes 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 tab is not displayed. See below for additional details.

Marketing Campaign without Leads User Roles and Licenses



The Detail tab displays with the following sections:

Basic Information

- **Campaign Name -** This mandatory field lists the Campaign's name.
- **Start Date -** Enter the Campaign Start Date.
- **Through 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** option is selected.
- **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.

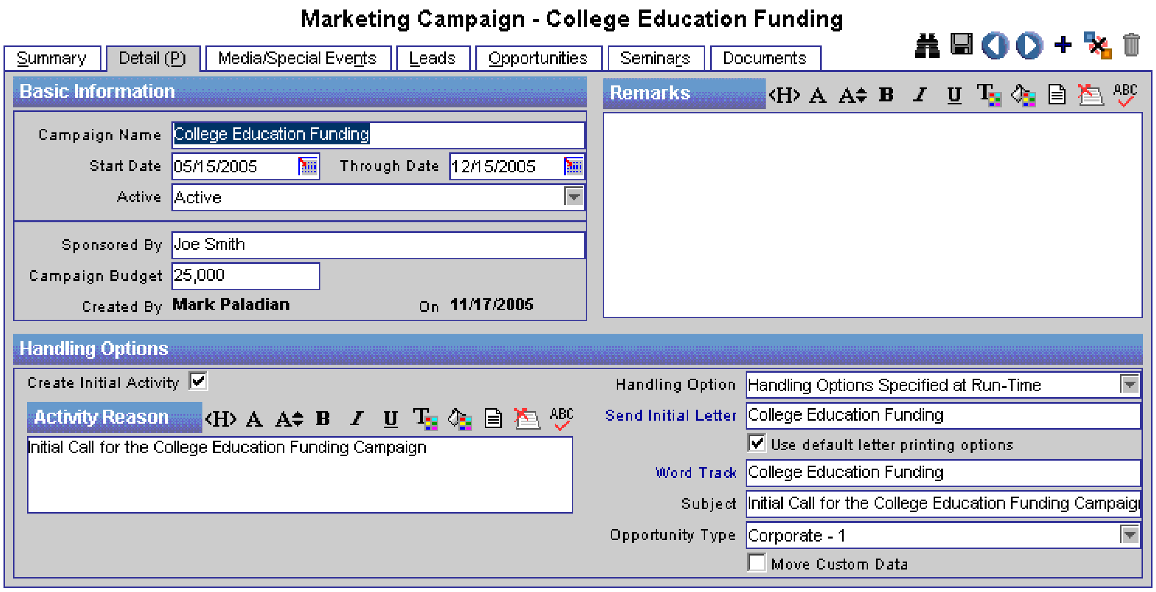
Default Handling Options

The Handling Options refer to a Call and/or a Letter that can be defined at the Campaign level and can be 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 option 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 run.
  - **Activity Reason** - The contents of this field are displayed in the respective field of the Activity Detail tab when the handling option is run.
- **Send Initial Letter -** Click this link to select a Letter to send when the handling options are run.
- **Use Default Letter Printing options -** If this option is selected, the Letter Printing options from User Preferences are applied.
- **Opportunity Type -** The Opportunity Type can be defined in the Marketing Campaign. If the Set is selected and is associated with the Marketing Campaign through the Marketing option, the Opportunity that is created will have the Opportunity Type of the Marketing Campaign.
- **Move Custom Data -** When Move Custom Data is selected, only the data from the Custom tab of a Lead Record (after acceptance of a lead) will be inserted into the contact record's Custom tab.
- **Remarks -** Enter any pertinent information into this free-form text field.

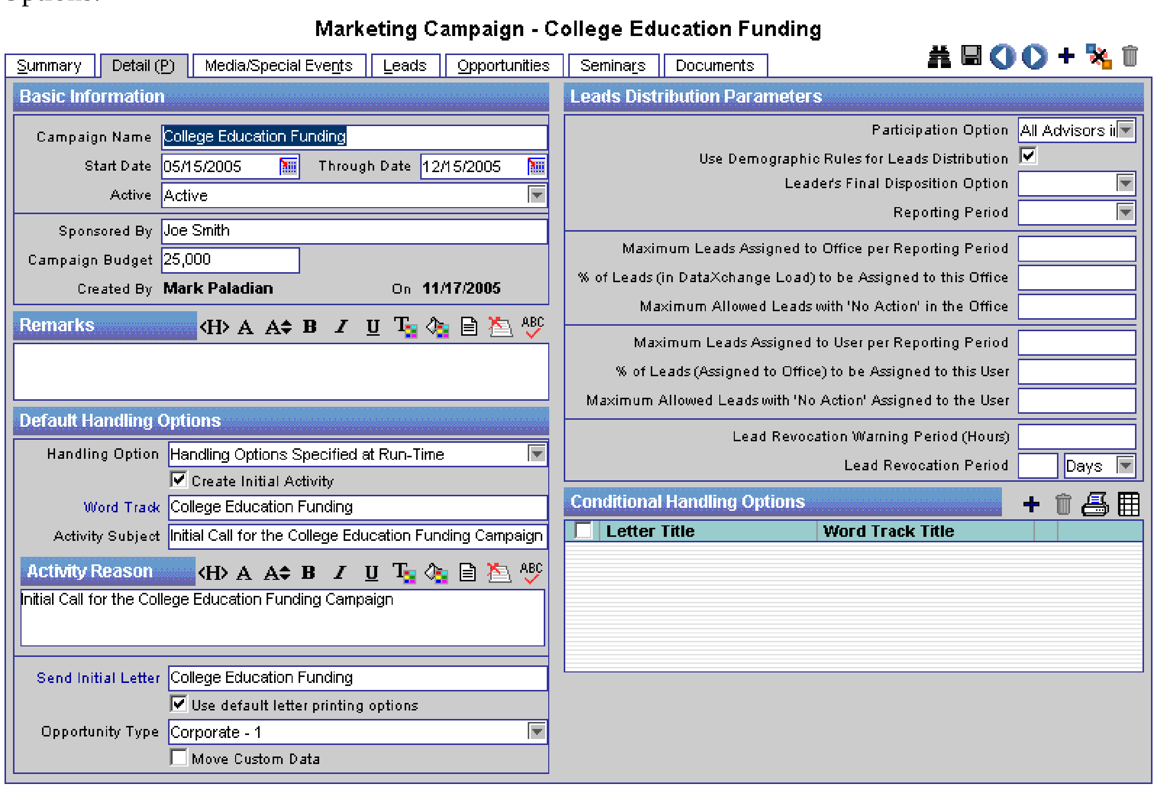
Marketing Campaign with the Leads Advisor User Role

If the user is a Leads Advisor, the Campaign Detail tab displays the following sections: Basic Information, Handling Options, Activity Reason and Remarks.



Marketing Campaign with Leads Coordinator User Role

For a Leads Coordinator, the campaign-handling options are dealt with differently. The Marketing Campaign Detail tab has the following sections: Basic Information, Remarks, Default Handling Options, Activity Reason, Leads Distribution Parameters and Conditional Handling Options.



Basic Information

- **Campaign Name -** This mandatory field lists the Campaign's name.
- **Start Date -** Enter the Campaign Start Date.
- **Through 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** option is selected.
- **Sponsored By -** Enter the name of the campaign sponsor into this field.
- **Campaign Budget -** Accepts numerical budget figures.
- **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/Activity -** Tag this option if the handling option is for a Call or Activity. 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 run.
- **Activity Reason -** The contents of this field are displayed in the respective field of the Activity Detail tab when the handling option is run.
- **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.
- **Opportunity Type** - The Opportunity Type can be defined in the Marketing Campaign. If the Lead is accepted with the Marketing Campaign and the Opportunity Type is defined in the Campaign, the Opportunity that is created will be associated with the Opportunity Type of the Campaign. If the Set is selected and is associated with the Marketing Campaign through the Marketing Option, the Opportunity that is created will have the Opportunity Type of the Marketing Campaign.
- **Move Custom Data -** When Move Custom Data is selected, only the data from the Custom tab of a Lead Record (after acceptance of a lead) will be inserted into the contact record's Custom tab.

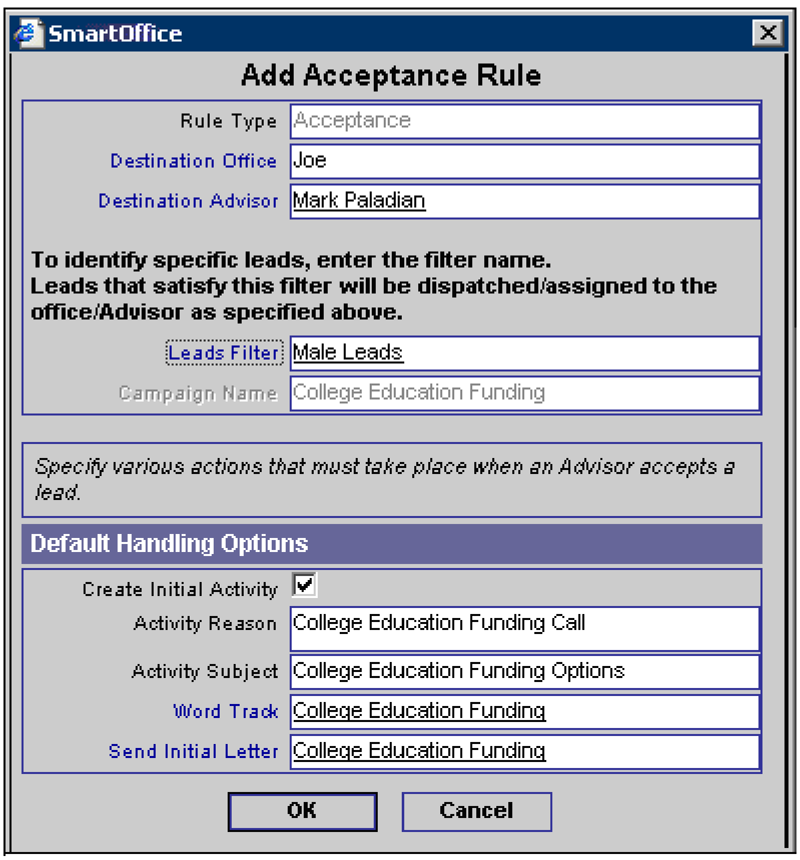
Leads Distribution Parameters

- **Participation Option -** Select the appropriate participation option from the drop-down list.
- **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.
- **Leader's Final Disposition Option -** Select the appropriate leader's final disposition option from the drop-down list.
- **Reporting Period** - Specify the reporting period from the drop-down list.

- **Maximum Leads Assigned to Office per Reporting Period -** Enter the maximum number of leads assigned to the office per reporting period.
- **% of Leads (in DataXchange Load) to be Assigned to this Office -** Enter the percentage of leads to be assigned to the office.
- **Maximum Allowed Leads with 'No Action' in the Office -** Enter the maximum allowed leads with 'No Action' in the office.
- **Maximum Leads Assigned to User Per Reporting Period -** Enter the maximum number of leads assigned to a user per reporting period.
- **% of Leads (Assigned to Office) to be Assigned to this User -** Enter the percentage of leads to be assigned to this user.
- **Maximum Allowed Leads with 'No Action' Assigned to the User -** Enter the maximum number of allowed leads with 'No Action' assigned to the user.
- **Lead Revocation Warning Period (Hours) -** Enter the lead revocation warning period in hours.
- **Lead Revocation Period -** After this period, all leads that belong to this Campaign begin to display in the Revocable Leads spreadsheet.

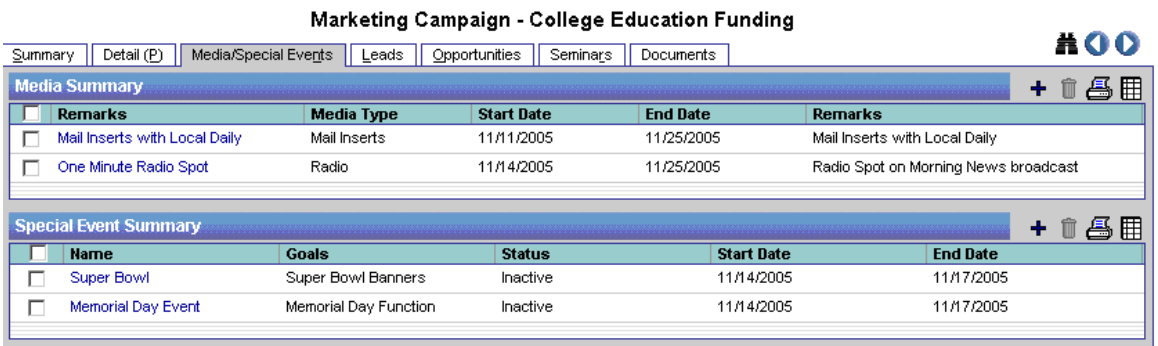
Conditional Handling Options

Conditional Handling Options enable 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.



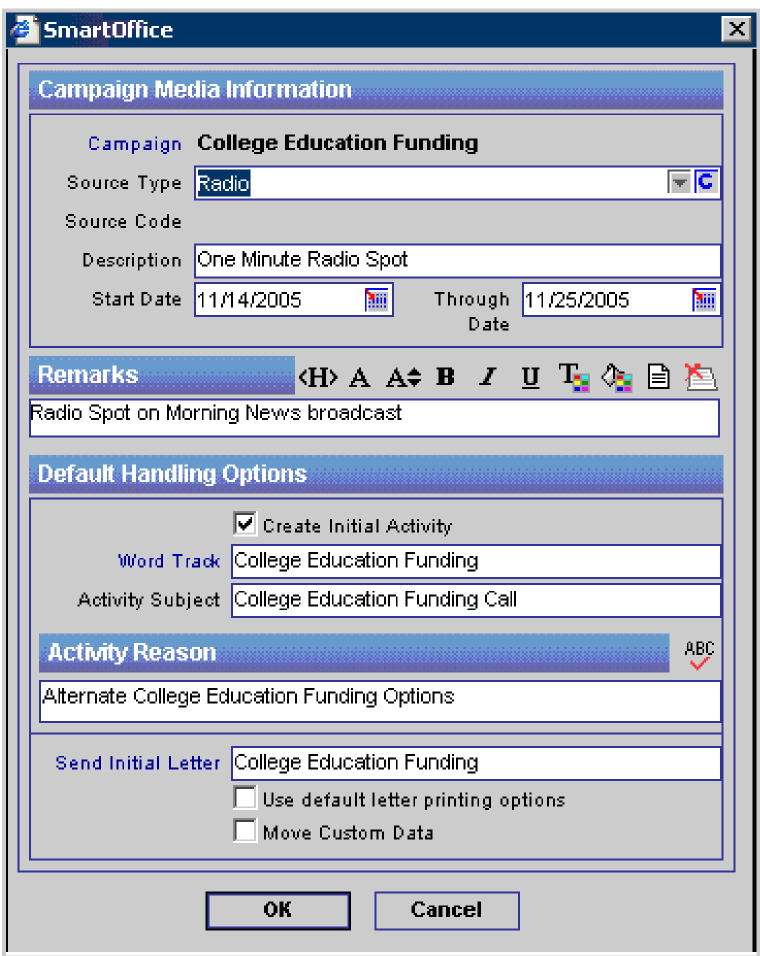
Use the hyperlinks to locate the appropriate Destination Advisor and Filter. Specify handling options in the section below. Conditional Handling Options override all other types of handling options defined at various points for a campaign. To execute these options, add a lead to this campaign. Ensure 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

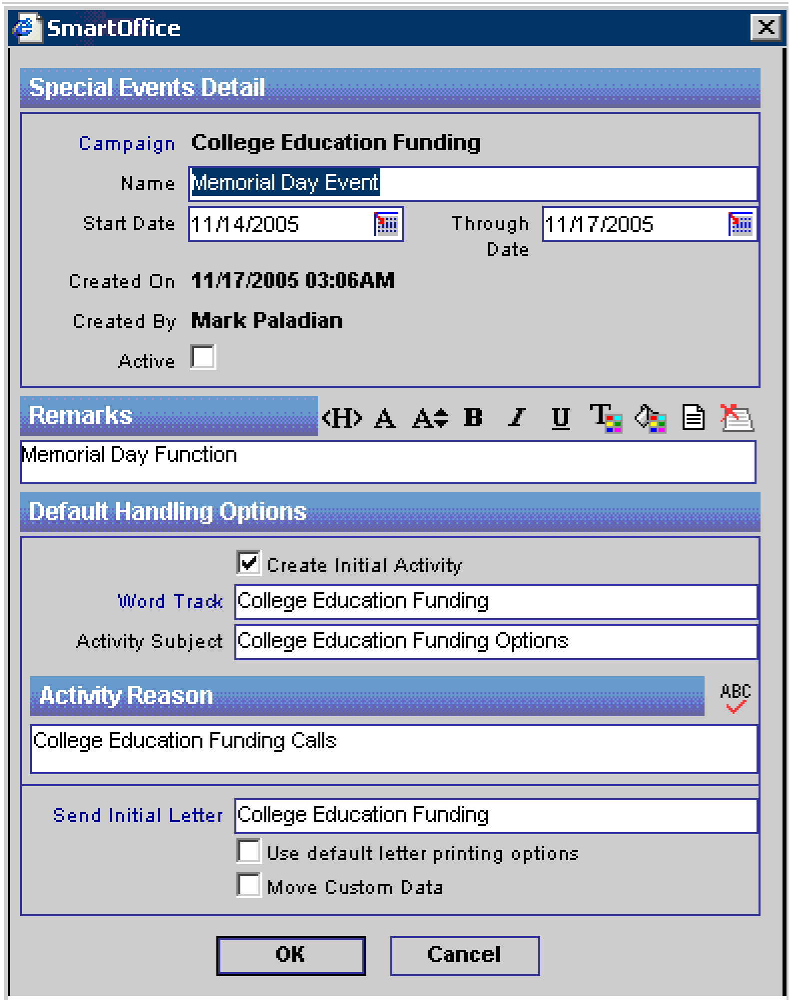


Within a Marketing Campaign, the sales efforts that target a specific media can be tracked at this tab in the Media Summary. Marketing attempts linked to certain special occasions can be listed in a separate Special Events Summary.

Add Media



Add Special Event



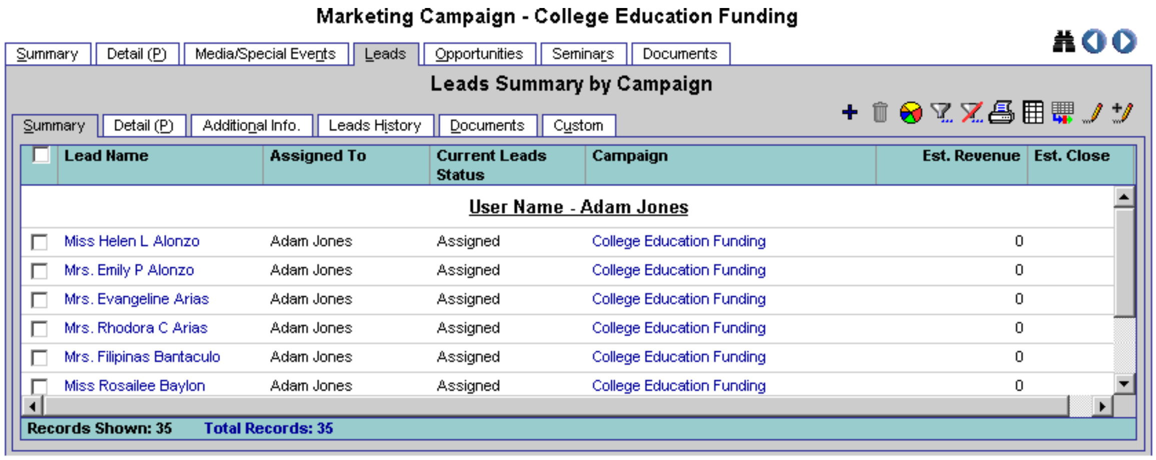
Handling Options can be linked to both Media and Special Events. For a Lead that is linked to this Campaign and the Media/Special Events, the respective handling options of the Media/Special Events are run.

Order of Precedence in Handling Options

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

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

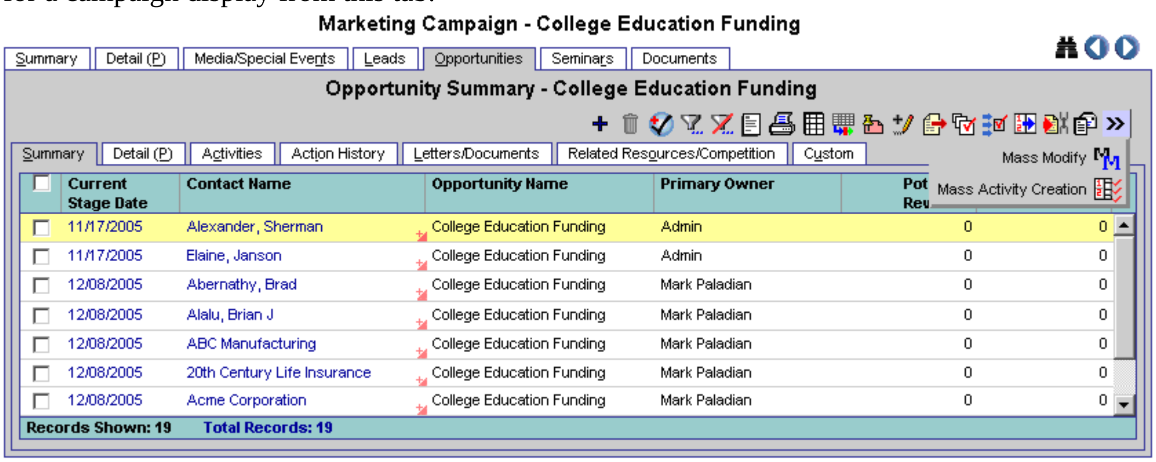
Leads



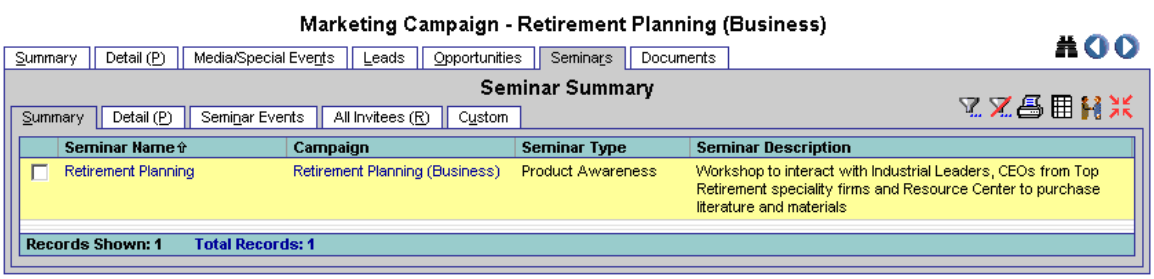
The Leads tab is only viewable by users with a Leads Tracking license. This list includes leads that belong to a selected campaign. For a locally created campaign, new leads can be added to this tab. From this tab, leads can only be added, modified and deleted. Specific leads functions like Assign, Reject, 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 display from this tab.



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 Campaigns and Leads

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

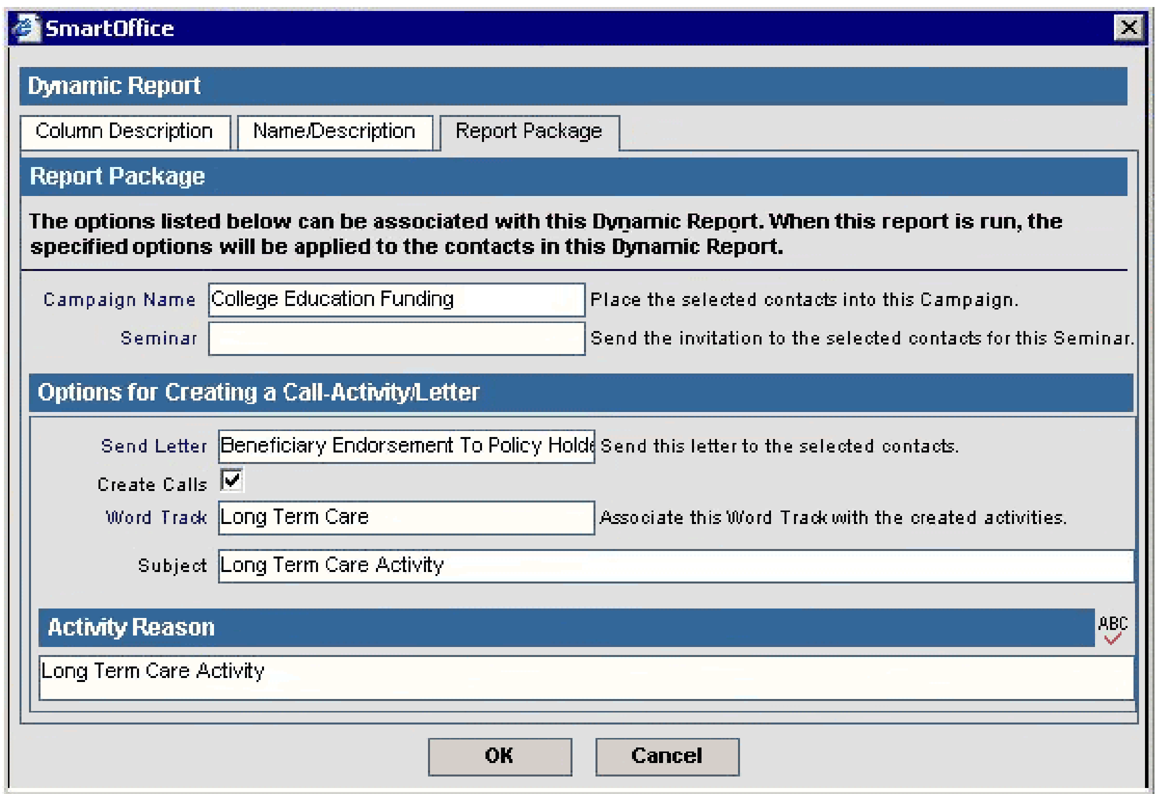
- The applicable Handling Options for a campaign execute when a lead is accepted and a corresponding Opportunity is created.
- From the Leads Summary, multiple leads can be selected to Mass Modify Campaigns. Leads can also be mass assigned to Campaigns when a leads import is run. At the end of the import, a Campaign can be selected from the drop-down list. All imported leads will be linked to this campaign.

Marketing Campaigns and Opportunities

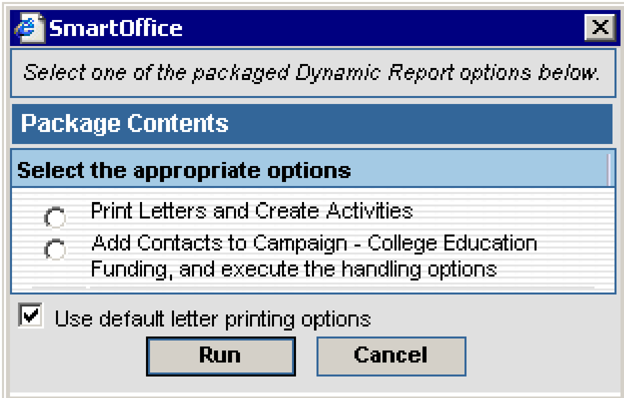
Default Campaign Handling Options execute from the Opportunity module when a new Opportunity is added with a campaign that has handling options. The Activity and Letter created as a part of the campaign handling options are saved in the Activities and Letters/Documents tabs respectively. The Activity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

Marketing Campaigns and 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 then click the **Execute Packaged Options** button on the Dynamic Report toolbar.

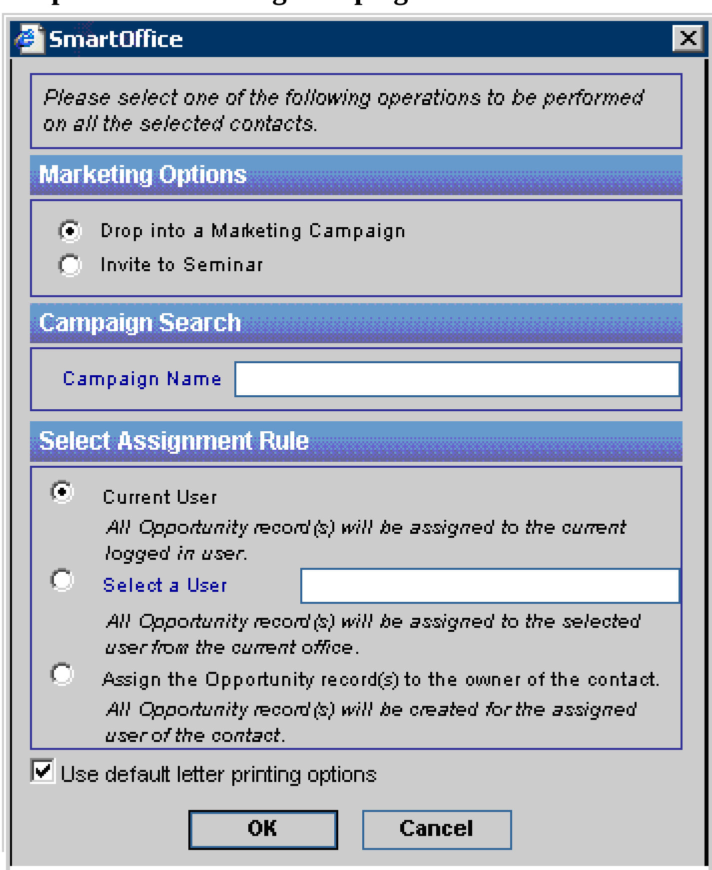


The Package Contents dialog box opens with the available options. When the **Add Contacts to Campaign** option is selected, an Opportunity is created with the Campaign and the handling options are run.

Marketing Campaigns as Marketing Options

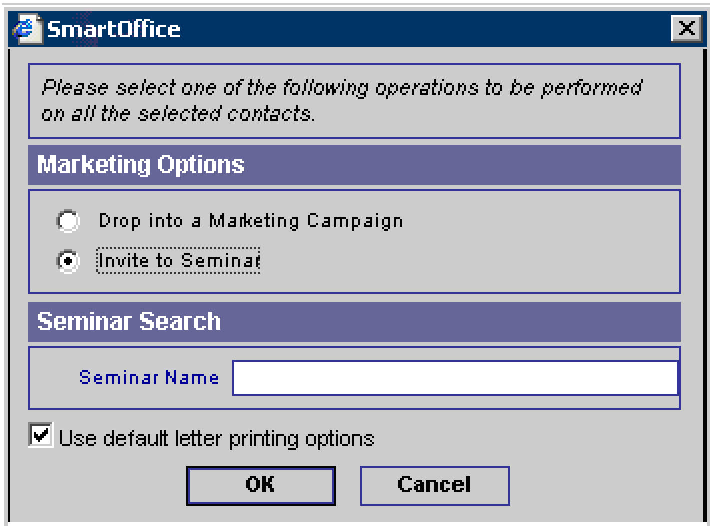
Marketing Options, such as Seminars and Marketing Campaigns, can be defined and applied to selected contacts.

Drop into a Marketing Campaign



1. From the Contact Summary, tag a record and then click the **Marketing Options** button (available from the Set Summary and Dynamic Report Summary).
2. In the Marketing Options dialog box, select **Drop into a Marketing Campaign** to display the additional Campaign Search and Select Assignment Rule sections.
3. Select a campaign with handling options and the appropriate Select Assignment Rule option and then click the **OK** button. For the selected contacts, a new Opportunity is created with the appropriate users as Primary Owner as per the options selected.

Invite to Seminar



1. From the Contact Summary, tag a record and then click the **Marketing Options** button.
2. In the Marketing Options dialog box, select **Invite to Seminar** to display the Seminar Search section.
3. Click the **Seminar Name** hyperlink, select a Seminar and then click the **OK** button. The tagged contact will display on the All Invitees tab of the specified Seminar.