

360 Dotnet

Campaign

Manager

Training Manual

Introduction

The Full Campaign Manager gives you the ability to target your client bank by creating your **own** sales and marketing campaigns.

You can run queries on all of your clients to a broad or specific range using query builder (with over a billion query combinations), then, based on your selected criteria can send your branded campaign via SMS, Email or Letter.

You can also use Full Campaign Manager to quickly, simply and without additional charge deliver your servicing arrangement/proposition to your clients e.g. Quarterly Newsletters.

Don't forget, the more defined the search and targeted the campaign, the better the response.

Getting started

Begin by double clicking on the Office Icon which should be located on the front screen of your PC



Your login page should now open, similar to this one.



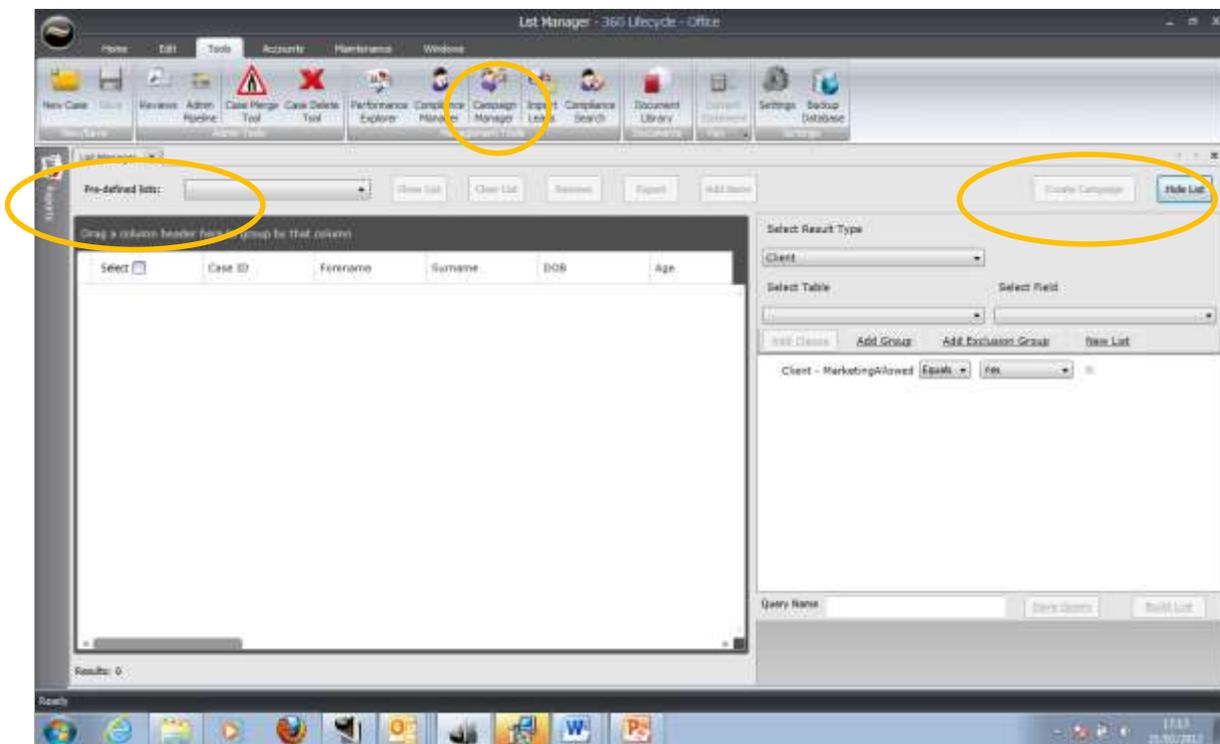
You will now be able to enter the username and password supplied to you.

To Begin

You are responsible for obtaining the appropriate sign off processes to meet Financial Promotions requirements and strongly advise producing/trialling the campaign material 'in house' before sending to clients.

Using Campaign Manager

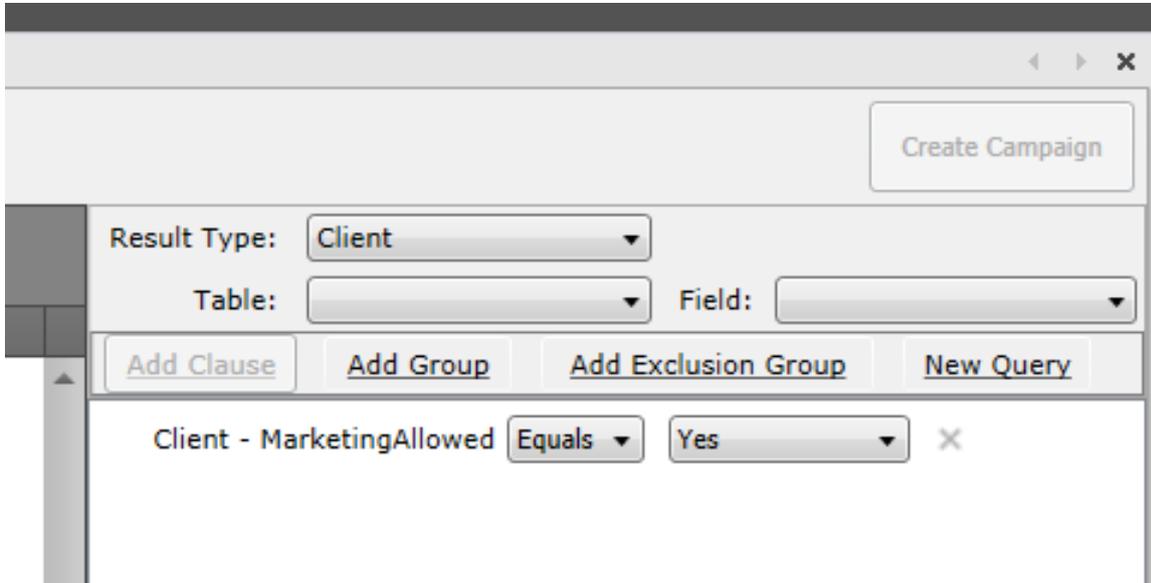
Open up **Office>Tools>Campaign Manager**. You have the option to **Build List** or select from **pre-defined lists** for ones that you have previously created and saved which can be re-used. This will enable you to build simple queries for broad messages or specific campaigns based on a more targeted client group based on specific more complex criteria.



Using Campaign Query Builder

To begin your campaign, first of all you will need to work out who your target client is. Once you have decided this, you can search that client by specifying an exact criteria.

To the right of the screen you will see a number of options that work together.



The first is **Select Result Type** = CASE OR CLIENT

This will determine whether your campaign material is client specific or to be communicated to all individuals held within a case record that meets the criteria. For example,

If you selected; Result Type = **Case** and ran a query on Date of Birth equals 1/1/1980, this would include and market to **all** clients on a case record, providing one individual on the case held the date of birth as 1/1/1980.

If you selected; Result Type = **Client** and ran a query on Date of Birth equals 1/1/1980, this would only return and include clients with a date of birth as 1/1/1980, disregarding all others included on the case record.

It is recommended that most campaigns will be ran with Result Type as Client, particularly targeted campaigns.

Select Table = This is the 'Table' or section of the database you would like to query i.e. WHETHER YOU WANT TO RUN QUERIES ON CLIENT, CASE OR A SPECIFIC POLICY TYPE INFORMATION.

Select Field = SELECT THE SPECIFIC DATA ITEM YOU WANT TO QUERY BASED ON THE TABLE SELECTED. The Field pick list items you can choose from vary, depending on the Table selected.

Add Clause = This is an AND statement e.g. "Has a mortgage with Halifax AND mortgage end date between x and x date"

Add Group = This is an OR statement e.g. "Has a mortgage with Halifax OR Nationwide"

Add Exclusion Group = THEY DON'T HAVE e.g. "Find all clients that **DON'T** have an ISA"

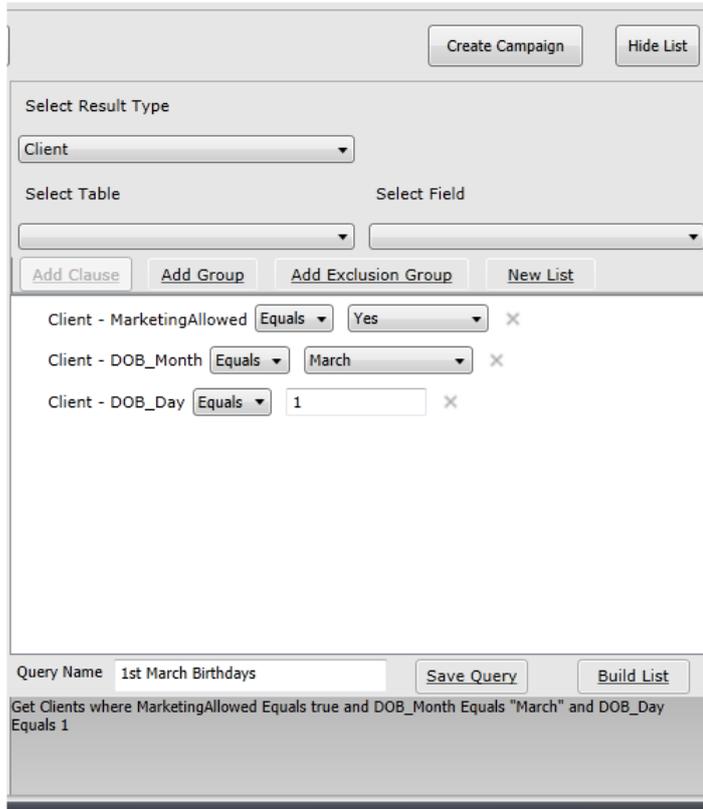
Each layer you want to add onto your query you need to amend the **Select Table and Select Field** and click on **ADD Clause, Group or Exclusion**.

Building a Campaign

We have listed three example scenarios to show how the logic is applied and enable you to build your own queries. Please note that you can **Run Query** at any point within the campaign building process to see the number of clients who are returned and how this changes as more criteria is added.

Example Query 1 – List all clients that have a birthday on 1st March

At **Result Type** select **Client**



At **Select Table** choose **Client** at **Select Field** select **DOB-Month** Click on **Add Clause > Equals>** then **select month** you want to search on e.g. March. To choose the date go to **Select Field** and **change the DOB-Month to DOB_Day** Click on **Add Clause>Equals>** then **type in the date e.g. 1.**

When choosing **Run Query** this will then filter and show a complete client list of all clients with the birthday 1st March.

If you wish to save this query, type in a name against Query Name and click **Save Query** to enable you to run that query again in the future from the Pre-defined lists drop down selection.

Example Query 2 – List all clients that have a mortgage with Halifax and the product end date is greater than 1st January 2012 and less than 1st April 2012



At **Select Result Type** select **Client**. At **Select Table** choose **Mortgage** at **Select Field** select **Lender**, Click on **Add Clause > Equals>** then **Halifax** or lender name you want to search on. To select the end dates go to **Select Field, change to EndDate and Add Clause**. Select **Greater than** enter the date i.e.1st Jan 2012 and again click on **Add Clause**. Select **Less than>**then **type in the date e.g 1 Apr 2012**. If you 'Run Query', this will return all clients with Halifax mortgages with an end date from 1/1/12 & to 1/4/12

If you wish to save this query, type in a name against Query Name and click **Save Query** to enable you to run that query again in the future from the Pre-defined lists drop down selection.

Example Query 3 – Show me all clients that are over 50 with an income of over £50k that have not got an ISA



At **Select Result Type** select **Client**. At **Select Table** choose **Client** at **Select Field** select **Age**, Click on **Add Clause > Greater than>**then **Type 50** or age you want to search on. Click on **Select Field** and **change to Income** and **Add Clause**. Select **Greater than** enter salary 50000.

To show clients that haven't taken out an ISA, click on **Select Table** choose **Investment** and in **Select Field** choose **Investment Type**. Next Click on **Add Exclusion Group >equals>ISA** Again click on **Add Exclusion Group >>equals>ISA Transfer** . . If you 'Run Query', this will return all clients over 50, with an income over £50k that do not have an ISA or ISA Transfer.

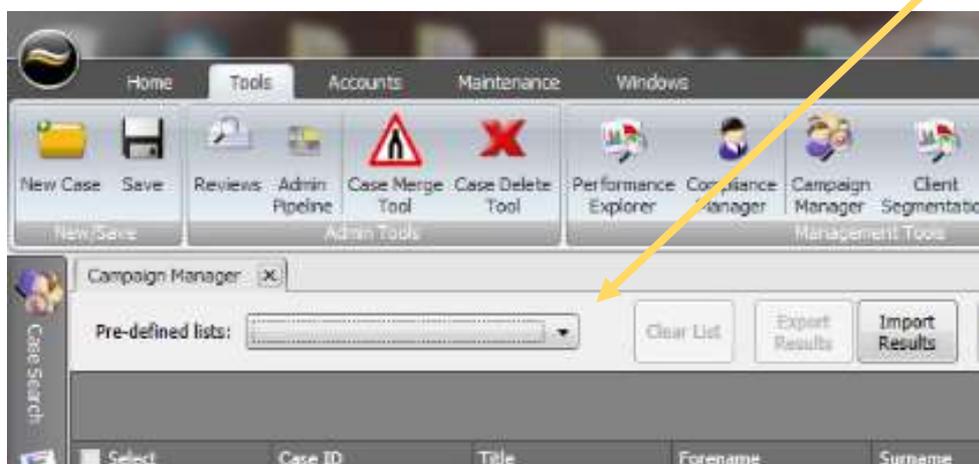
If you wish to save this query, type in a name against Query Name and click **Save Query** to enable you to run that query again in the future from the Pre-defined lists drop down selection.

Saving a Query for future use

Once you have created the final criteria you can save your query to save yourself time when re-running in the future. This is handy if you want to use the same criteria at another point in the future.

All you need to do is type a **Query Name** to the bottom right of your screen beneath your list. Once you have entered a query name e.g. 'Birthday in March', you can then select '**Save query**' and this query will be saved allowing you to re-run this quickly and easily at some point in the future.

Next time you log in you will see this saved query held within the **Pre-defined lists'** drop down menu, which is situated to the top left of '**Campaign Manager.**'



Removing Clients From The Selected Build List

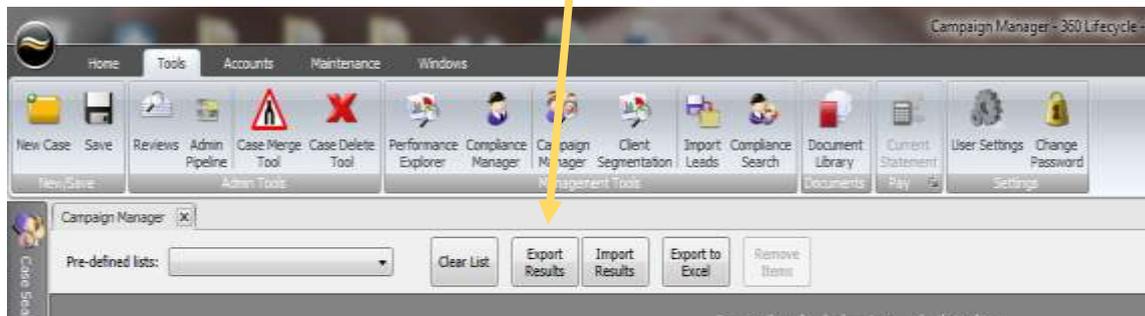
Once you have your results you may wish to amend the list by removing certain clients which fit the build criteria. Simply click on the checkbox of any clients you wish to remove and select '**Remove Items**'.



Exporting Your Client List

With your final list of clients displayed, you can also export the list to Excel so you can mailshot outside of Campaign Manager or Export Results of which can then be reimported back into Campaign Manager at another point in the future.

Export results



This is as sounds and will allow you to export the results of your specified search, however it does so in a format which can be easily imported back into the system. This is useful if you wish to do a follow up campaign to the same clients at some point.

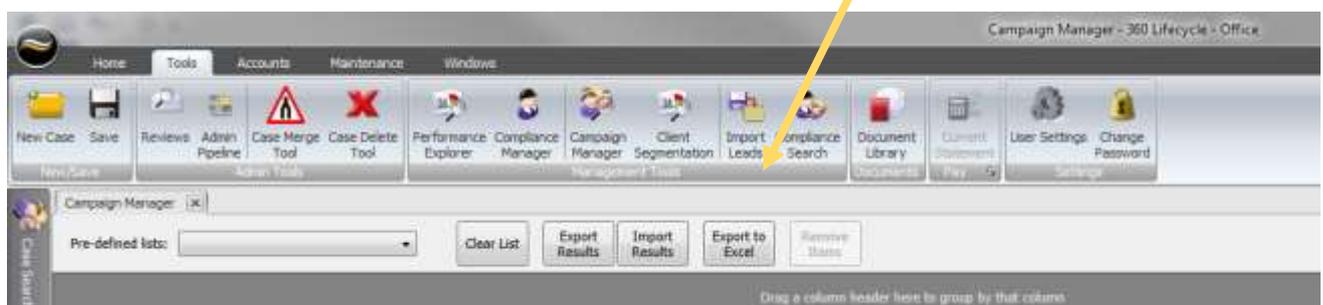
All you need to do once you have your list ready is select '**Export Results**' this will bring up the '**Save as**' screen within your P.C.

Type a filename you will easily remember and select save, this file type is designed as a back-up and may not be readable to you. However, if you later wish to re-import these clients, this can be done quickly and easily by selecting the '**Import Results**' button, this will allow you to search and re-select the file from within your computer.



Export to Excel

If however, you wish to save your list of clients in a format which can be viewed outside of Campaign Manager, you can save this as an Excel CSV document, just by selecting the next button along which is '**Export to Excel.**'

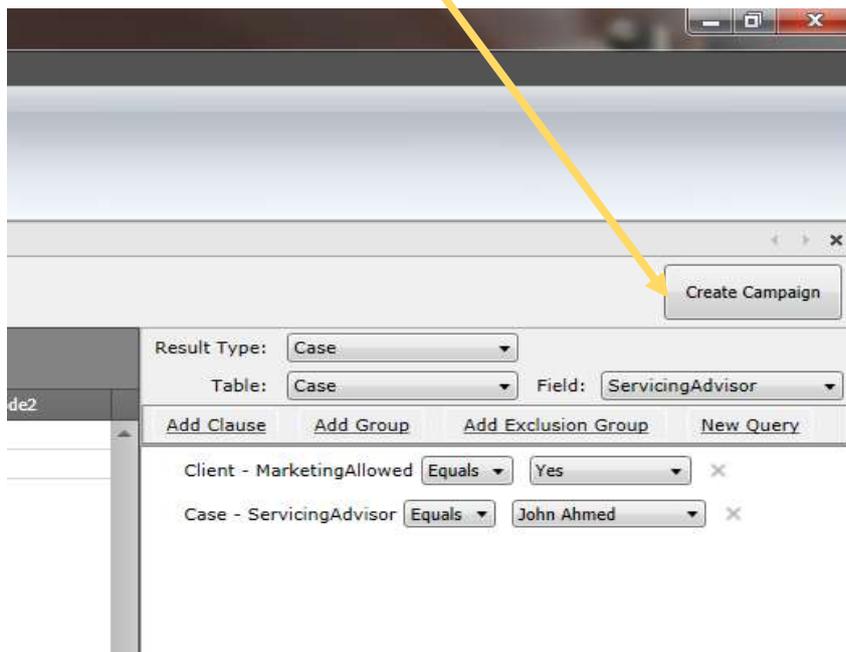


This can be done in the same way as before, once you have selected '**Export to Excel**' as above, you will be given the option to save as your chosen file name within your documents or to your desktop.

Sending Campaigns by SMS, Letter or Email

With your query build complete, choosing **Create Campaign** gives you 3 options to communicate to the client by, either, **SMS, Printed Letter or Email**. Either option creates an audit trail against each client/case record included within the campaign, whether or not a sales opportunity is created as part of the process. If a sales opportunity has been created, the SMS will show in the notes section of the sales opportunity and the Letter & Email will show in the 'Sales Opportunity Document' section. Otherwise, if an opportunity has NOT been created an audit trail will show within 'Contact History' for SMS and the 'Documents' tab for Emails & Letters.

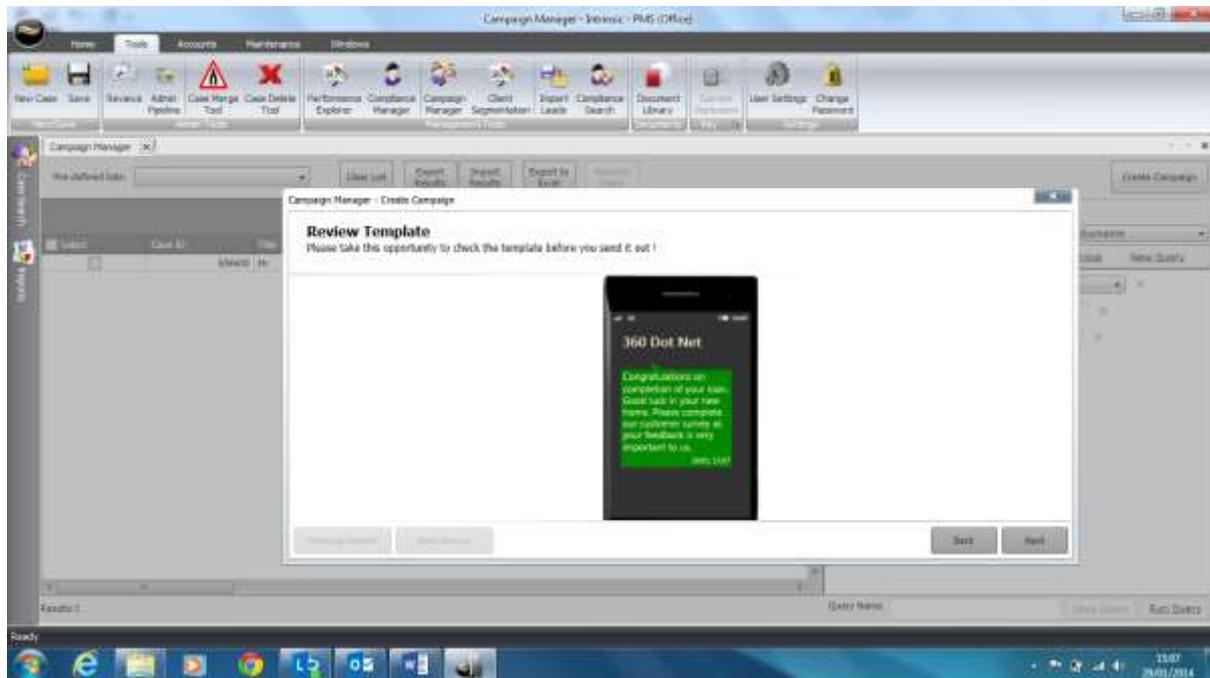
To start click on **Create Campaign**



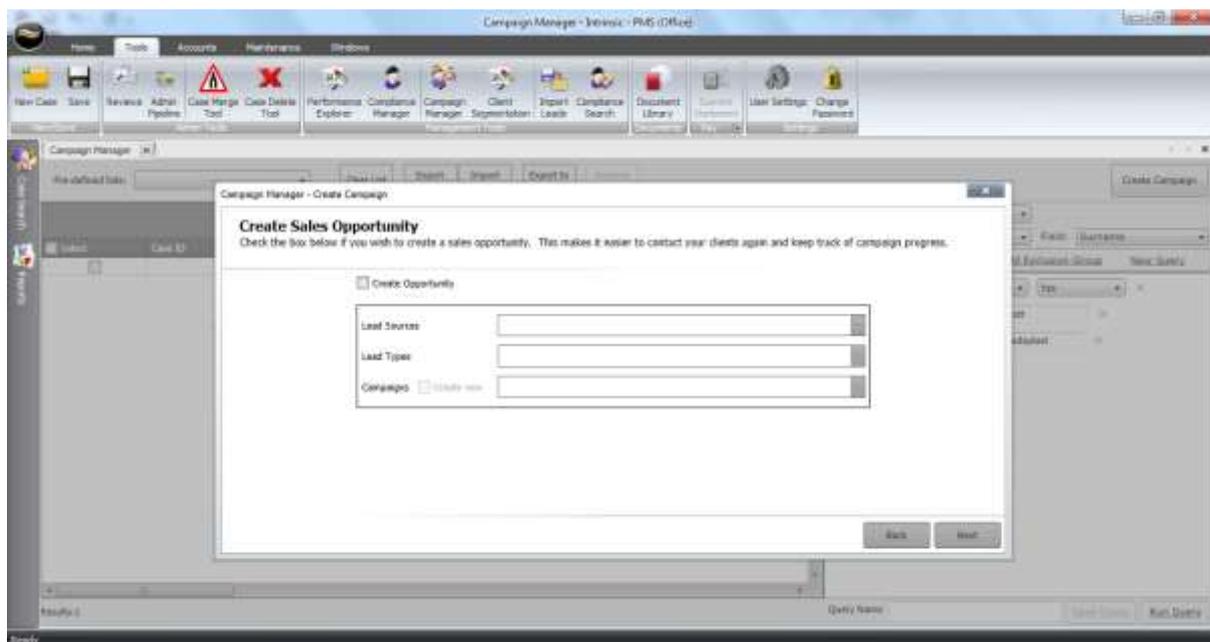
You will then be offered 3 choices



On choosing **'Next'** you have the ability to Review your template, confirming the SMS ID/mobile this will be sent from and the content of the message to be displayed on the clients device.

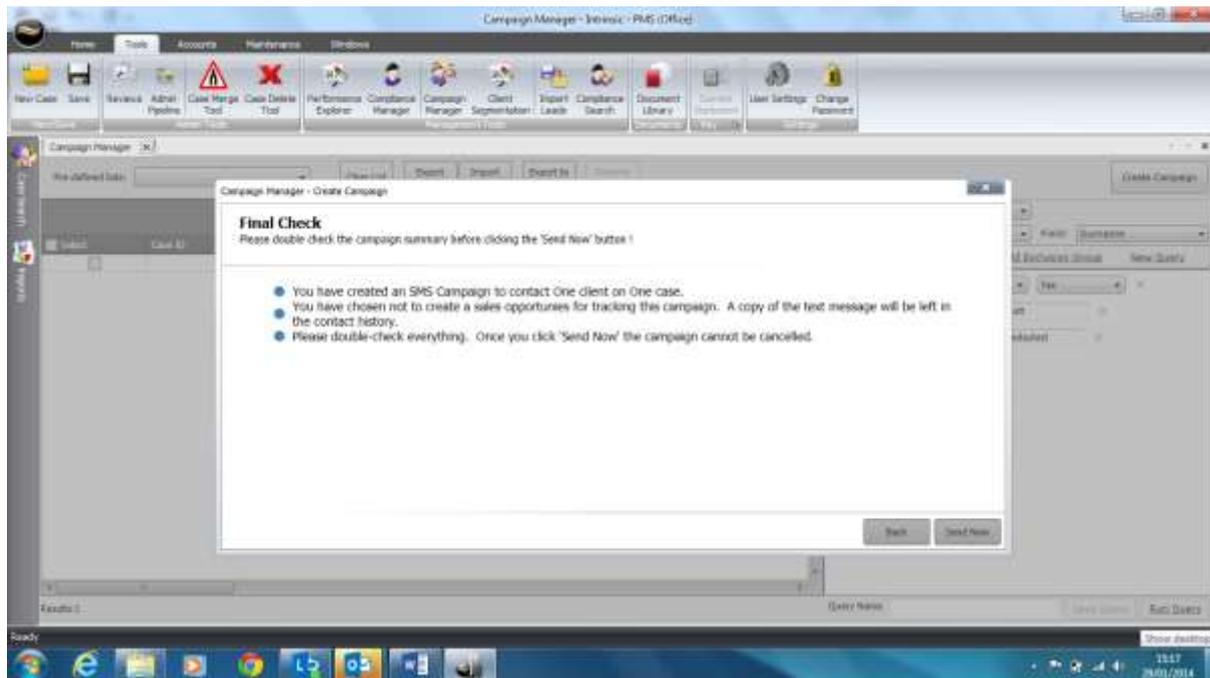


After reviewing the SMS template you then have the option to **'Create Opportunity'**. If selected this will create a sales opportunity in the servicing advisor's hotbox for each of their clients included within the campaign. Creating a sales opportunity as part of the campaign process is a great way of using as a follow up reminder and seeing how successful the campaign has been.



Before sending the SMS Campaign you are taken to a Final Check screen. This will confirm the number of the clients the campaign will be sent to, if a sales opportunity is to be created against the clients included and that a copy of the campaign material will be stored against the client record. Please note that if a sales opportunity is being created as part of the campaign process then a copy of the campaign will be stored against the opportunity, if not then a copy of the campaign material will be recorded at the Case ID level.

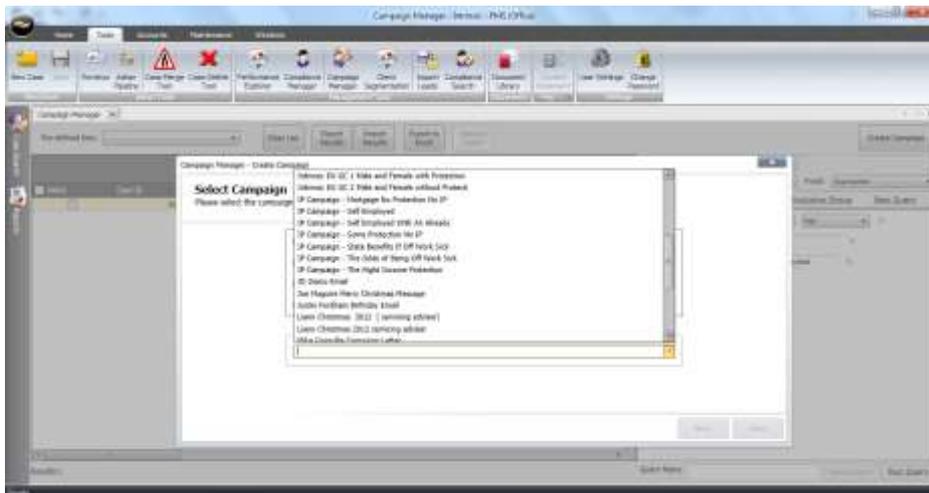
Choosing **'Send Now'** will immediately distribute the campaign. You will receive an automatic email once the campaign has been sent confirming the number of recipients and any duplicate SMS numbers detected.



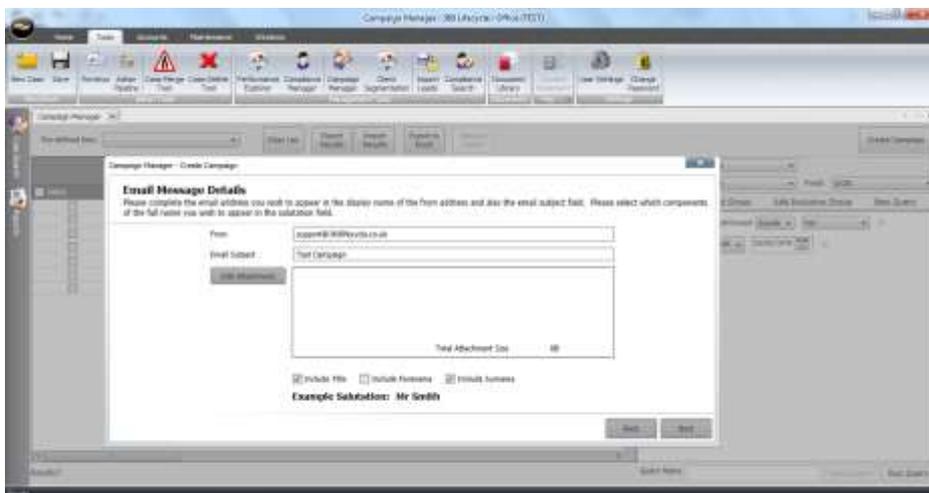
Sending an Email Campaign

An email campaign is a great and cost free way of contacting your clients. Please note that any duplicate email addresses within the campaign will be detected so only one email will be sent to each email address included within the campaign.

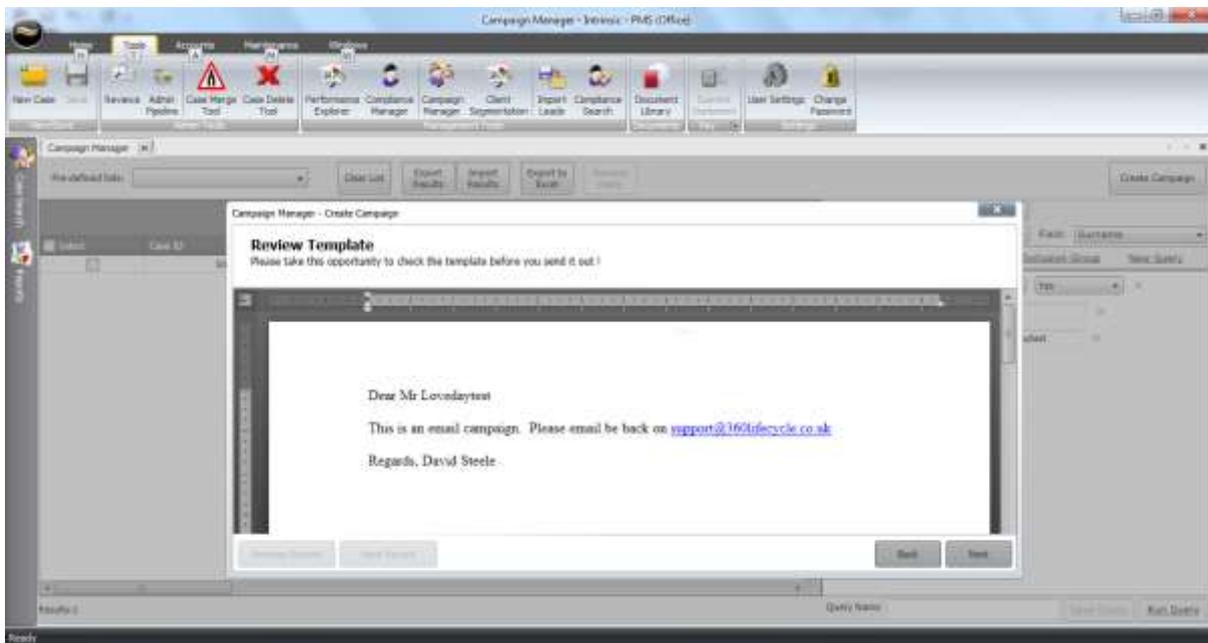
You can set up new email templates including margins, your company fonts, colours, bold, italic & hyperlinks etc... To set up email templates quickly and easily, in Office, go to **'Maintenance'** select **'Email Templates'** and choose **'New'**. You can now create your email template by 'right clicking' and adding the required fields by selecting **'Insert Merge Field'** to pre-populate data. As you create your template email, **Spell Check** will automatically highlight any mistakes enabling you to 'right click' and correct the spelling accordingly. Using Editor, you can also change the fonts and colour of your text. You can reuse the campaigns, the lists or the templates. As per SMS & Letter, a copy of the email campaign will be saved against your client record. When sending an Email campaign, ensure that you add the email disclaimer merge field to the bottom of email template. The email disclaimer merge field is collecting the information held in Office, **'Tools'** and **'User Settings'**. **Email Campaign** is the top option on your **'Campaign Manager'**. Once you have selected **'Email Marketing Campaign'** you will be able to choose your template type from the drop down box.



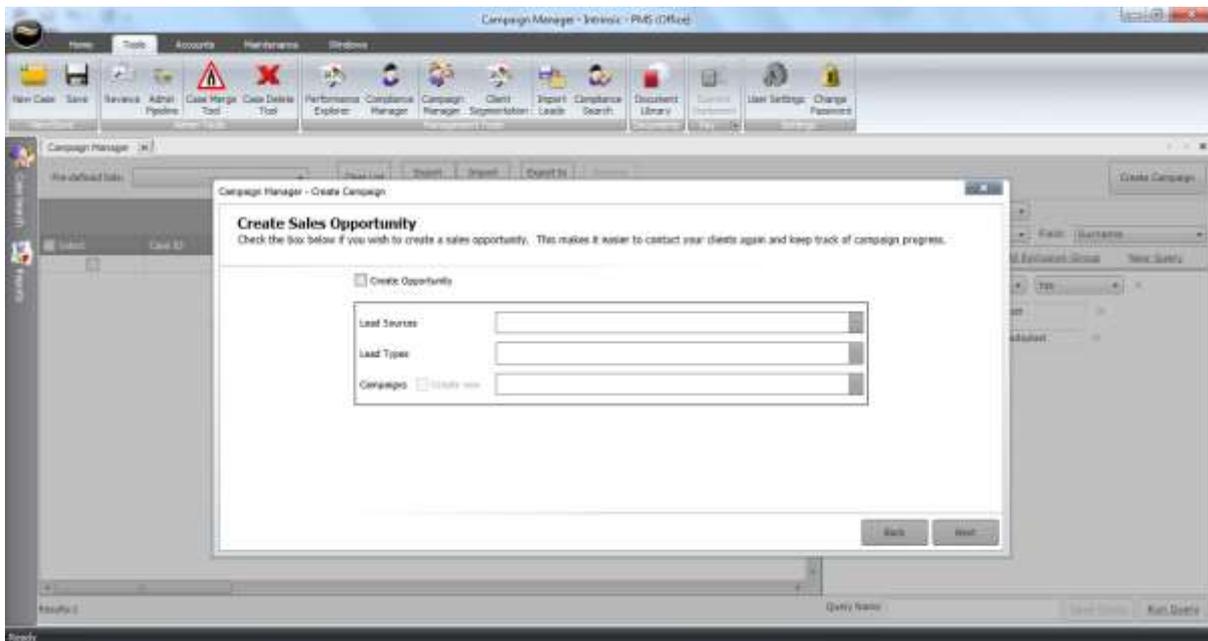
After selecting your template you are able to change the email address that the email campaign is shown from, enter an email subject, add attachments up to a size of 5mb and if there is a salutation merge field within the email template confirm the format of the salutation.



On choosing **'Next'** you have the ability to Review your template, confirming the content of the email message to be received by your clients. You can choose **'Next Record'** to check the content of the next client included within the campaign if you wish.

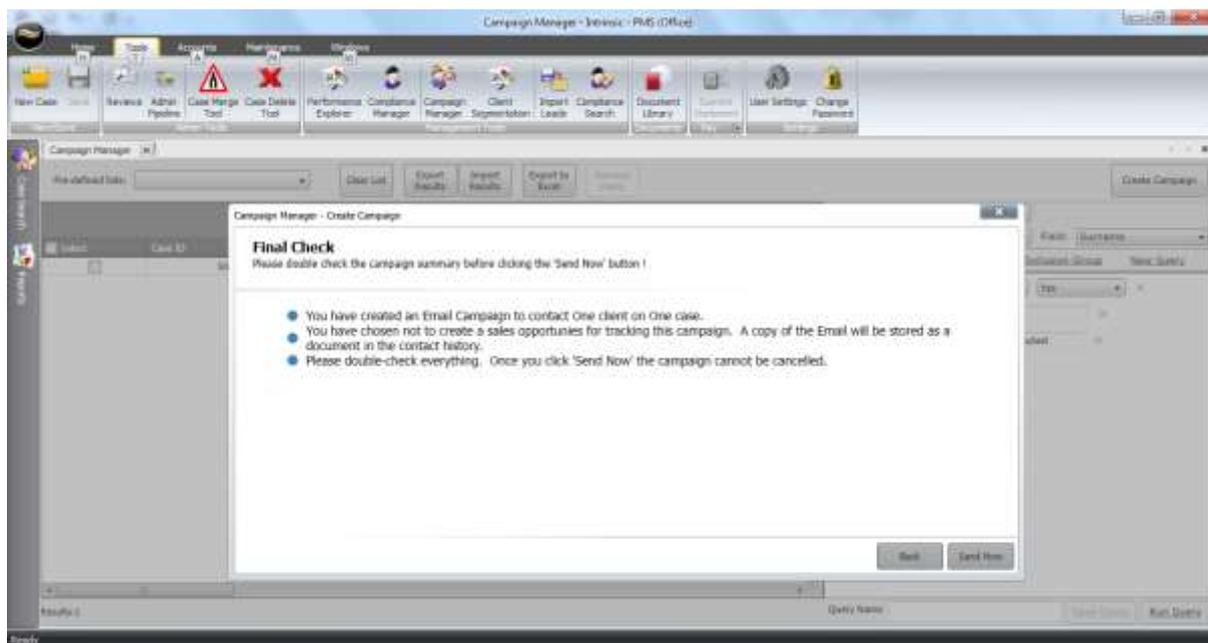


After reviewing the email template you then have the option to **'Create Opportunity'**. If selected this will create a sales opportunity in the servicing advisor's hotbox for each of their clients included within the campaign. Creating a sales opportunity as part of the campaign process is a great way of using as a follow up reminder and seeing how successful the campaign has been.



Before sending the Email Campaign you are taken to a Final Check screen. This will confirm the number of the clients the campaign will be sent to, if a sales opportunity is to be created against the clients included and that a copy of the campaign material will be stored against the client record. Please note that if a sales opportunity is being created as part of the campaign process then a copy of the campaign will be stored against the opportunity, if not then a copy of the campaign material will be recorded at the Case ID level.

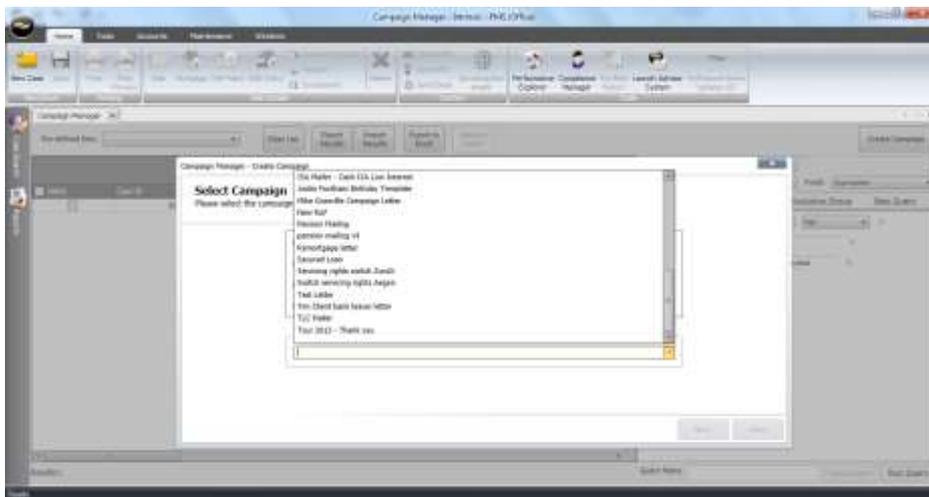
Choosing **'Send Now'** will immediately distribute the campaign. You will receive an automatic email once the campaign has been sent confirming the number of recipients and any duplicate email addresses detected.



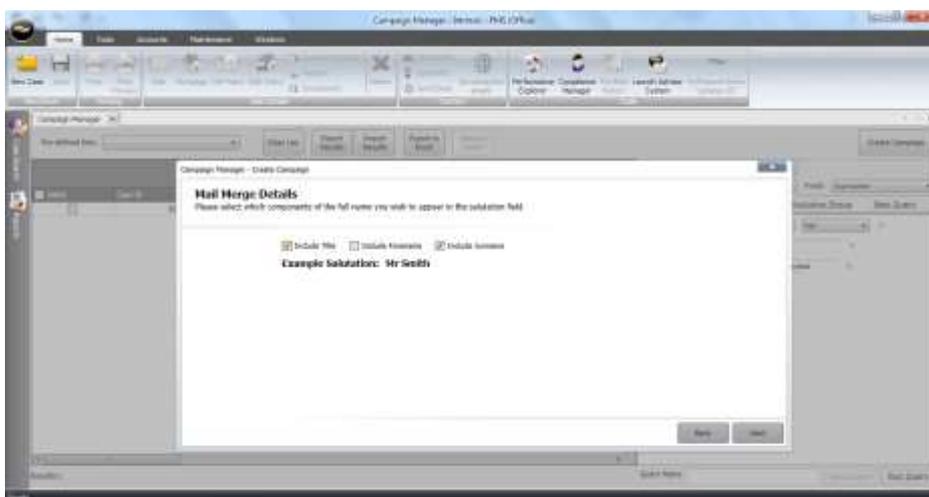
Sending a Printed Letter Campaign

A print campaign is produced much in the same way as an email campaign. You can set up new letter templates including margins, your company fonts, logos, colours, bold, italic & hyperlinks etc... To use and set up letter templates in Office go to '**Maintenance**' and select '**Mail Merge Templates**' and choose '**New**'. You can now create your letter template using the Editor to add and include Headers & Footers, change fonts and colours and also adjust margins to accommodate your headed paper. By right clicking on your template letter and selecting '**Insert Merge Field**' you have the ability to choose which fields are required to pre-populate data. Add your company logo by clicking the 'Insert' tab and then 'Pictures'. Also included is the ability to add tables to your documents making it possible to produce simple forms. As you create your template letter **Spell Check** will automatically highlight any errors enabling you to 'right click' and correct the spelling accordingly. You can reuse the campaigns, the lists or the templates. The letter will be saved as a document against your client record.

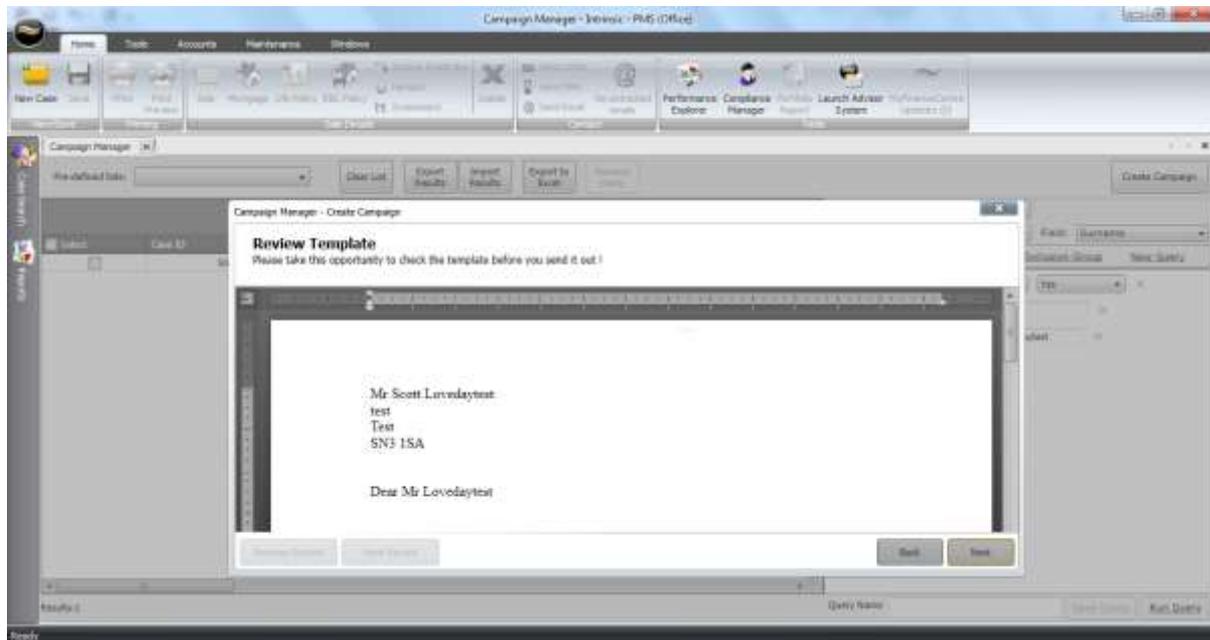
A Printed Letter Campaign is the second option on your '**Campaign Manager**'. Once you have selected '**Print Mail Merge**' you will be able to choose your template type from the drop down box.



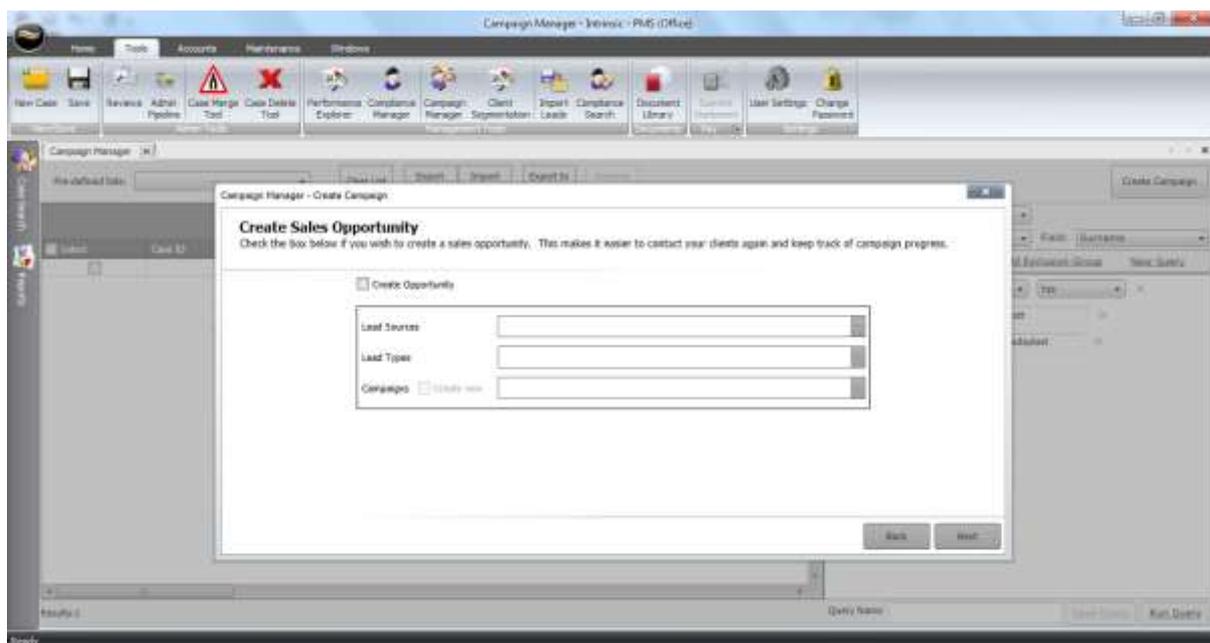
After selecting your template you are able to confirm the format of the salutation.



On choosing **'Next'** you have the ability to Review your template, confirming the content of the Letter to be produced for your clients. You can choose **'Next Record'** to check the content of the next client included within the campaign if you wish.



After reviewing the template you then have the option to **'Create Opportunity'**. If selected this will create a sales opportunity in the servicing advisor's hotbox for each of their clients included within the campaign. Creating a sales opportunity as part of the campaign process is a great way of using as a follow up reminder and seeing how successful the campaign has been.



Before producing the Printed Letter Campaign you are taken to a Final Check screen. This will confirm the number of the clients the campaign will be sent to, if a sales opportunity is to be created against the clients included and that a copy of the campaign material will be stored against the client record. Please note that if a sales opportunity is being created as part of the campaign process then a copy of the campaign will be stored against the opportunity, if not then a copy of the campaign material will be recorded at the Case ID level.

Choosing **'Send Now'** will immediately allow you to then produce your Printed Campaign.

