Marketing pro

Campaigns

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Contents

1 Introduction

The Marketing pro module enables you to plan campaigns, for example, using form letters and e-mail campaign, faxes and phone calls.

- Campaigns are represented as new data record type in CAS genesisWorld.
- A campaign consists of several phases, which can be further enhanced with additional phases.
- Plan and execute your campaign with a graphical user interface.
- You can enter customer responses directly in a campaign or in the data record of addresses or phone calls.
- A campaign's addresses are linked with the campaign data record. When you create documents, e-mails, phone calls, and other data records for a campaign, they are linked with the corresponding addresses.
- You can always check the current status of a campaign and see, for example, which action has already been executed for an address or which response was given.
- Actions like e-mail campaigns, form letters, and phone calls are universally supported.
- Permitted and preferred communication channels are taken into account when creating campaigns.
- You can store any templates, for example, for form letters, in different actions of a campaign.
- You can define a budget for a campaign and enter costs for all actions and media.
- You can make comprehensive evaluations for benchmarking.

1.1 Important information

The Marketing pro module requires a separate license. You enter this as usual in the **Licenses** area of the Management Console where you can also activate the licenses for specific users.

Working with Marketing pro may affect other modules or integrations. For more information on these possible affects, please go to the English hilfe.cas.de and look up the **Working with several modules** online help, Marketing pro.

1.2 How to use the Marketing pro module

The Marketing pro module was designed to specifically target and systematically communicate with a selected group of individuals of your choice using a combination of different marketing media - it is an invaluable tool to help you realize your marketing campaigns.

Using Marketing pro, you can reach out and communicate with several hundred contacts during a campaign. The graphic campaign designer provides you with a visualization of your campaign and ensures a structured view from the outset.

The module provides you with essential support during the planning and execution of your campaigns, from allocating addresses to evaluating responses and costs. Functions such as the planning of automatic actions depending on responses help your campaigns to run smoothly.

Follow up campaigns can be initiated directly from current or completed campaign using Marketing pro.

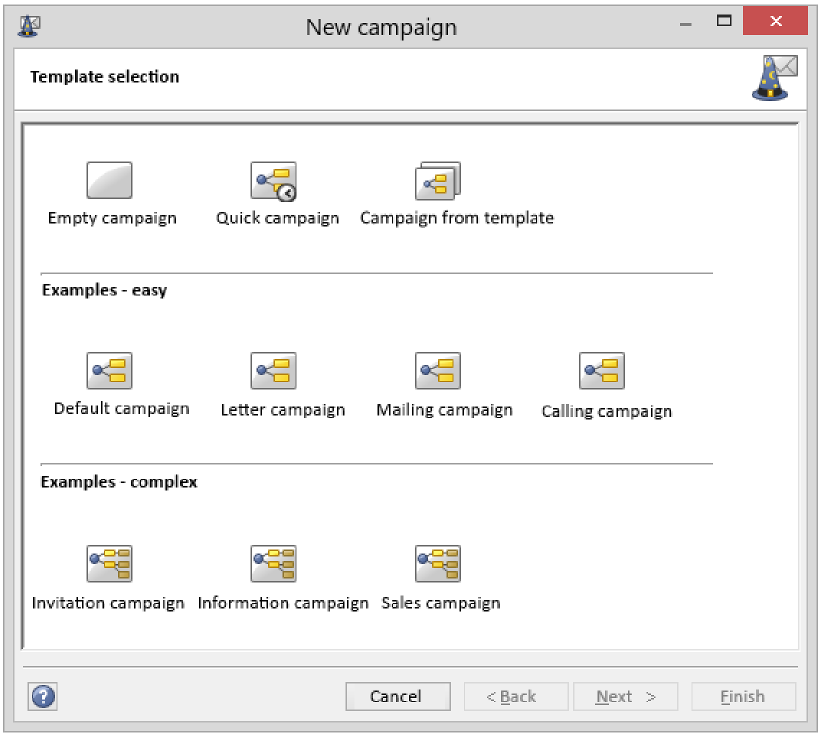
Notes

We recommend that you do not work with more than approximately 5000 contacts per campaign as this ensures that you can still process the data quickly.

The sending times of your campaign are influenced by the size of the e-mail and any attachments as well as the performance of your e-mail system.

2 Creating campaigns

A wizard helps you to create a campaign.



After creating a campaign, the respective data record is displayed in list views or dossiers. You can search for it with the search function.

✓ Go to the **File** menu and click **New/Campaign**.

The **New campaign wizard** opens the **Template selection** window.

Templates may contain different phases and responses. The following will describe the different pages of the wizard. The proceeding with **Campaign from template** follows the same pattern as duplicating an existing campaign.

✓ After finishing the wizard, a new **Campaign** data record is created.

The new campaign is then based on the **campaign** template you select. For further planning and execution, you change and edit the new **Campaign** data record.

Address selection

This page is the same for all templates. On this page, you can select the addresses for the campaign.

✓ **Add selected addresses** adds the addresses that you have selected in a view.

✓ If you select **Add addresses from view**, a page opens displaying all views for addresses from all navigators to which you have access.

- ✓ At the same time, views with address filters are displayed. Lists without filters are not displayed.
- ✓ **Select addresses via search** opens the **Search** window.

These three options are also available for distribution lists.

- ✓ **No address transfer** creates the data record for a campaign; you only select the address during the process of planning a campaign.

When you plan a campaign, you can always add more addresses, see chapter "Assigning addresses" on page 15.

2.1 Campaign templates

Quick campaign

- ✓ If you select the **Quick campaign** template, the **Address selection page** opens. Select addresses or a distribution list.

The basic procedure for executing a quick campaign is described in the Online help on the Campaign wizard page.

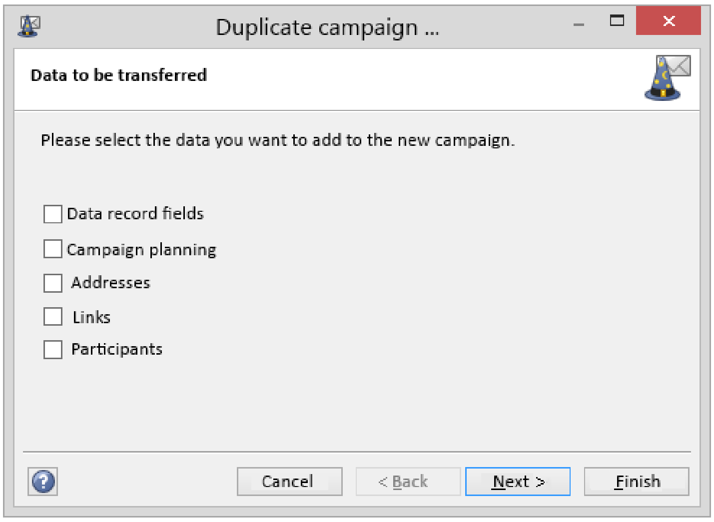
Using a template for the campaign

- ✓ If you select **Use a template for campaign**, the **Campaign selection** page opens showing a list of all available campaigns.
- ✓ On the **Data to be transferred** page, you select the data you would like to apply.

  You can choose between the same options as for duplicating an address, see chapter "Duplicating campaigns" on page 8

2.2 Duplicating campaigns

✓ If you duplicate the data record of a campaign, the **Data to be transferred** page opens.



✓ Select the data of the initial data record that you want to transfer to the new data record.

Data record fields adds the subject, start, end, keywords, notes, and so on, to the new campaign.

Campaign structure adds phases and responses to a new campaign.

With **Addresses**, **Links** or **Participants**, the corresponding data is transferred to the new campaign.

✓ On the **Address selection** page, select addresses or distribution lists.

3 Editing campaign data records

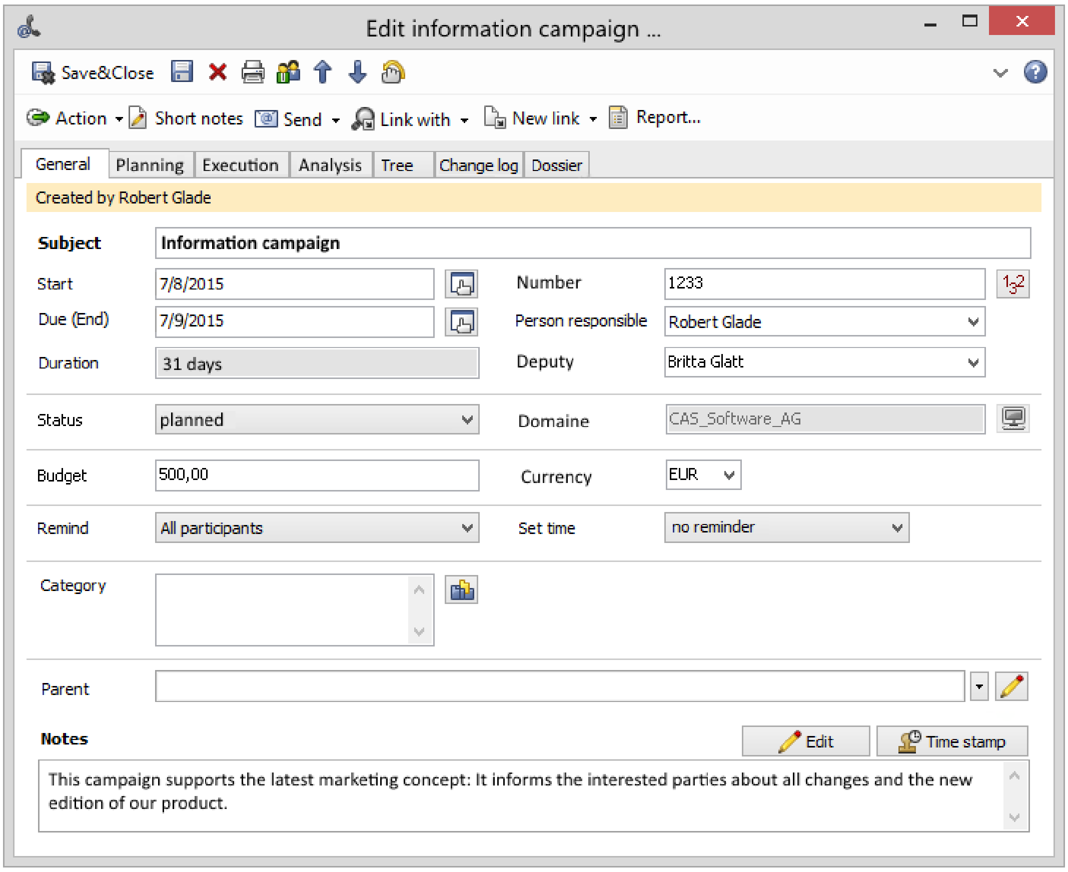
After creating a campaign, the respective data record is displayed in list views or dossiers. You can search for it with the search function.

Under **Subject,** enter a name for the data record. The data record is usually displayed under this name in all views. Another important field can be displayed in the dossier below the Subject headline. The administrator defines this option in the Management Console.

The fields described in this document are available in a data record type depending on the edition you are working with and on the settings the administrator has defined in the Management Console. The same applies for tabs in data record types. Please contact your administrator if necessary.

The tabs displayed in a data record also depend on the entry you select in the **Type** field.

For example, the **Tree** tab is displayed in addresses if you are working with primary links. The **Details** tab is not displayed for phone calls because all required fields are in the **General** tab.



You cannot create new default templates for campaign data record types. All the default templates are available in the wizard. Using the **Campaign as a template** function in the wizard, you can use existing campaigns as templates.

Notes

Users with a Marketing pro license have access to the campaign data record type. These users can create campaigns, plan, manage and trigger the respective actions.

Users who do not have a Marketing pro license, have access to the Campaign tab in the address data record.

These users can record responses from address data records. Additionally, they will be able to see what phase of the campaign the address is currently in.

This ensures that every user can record responses, while the other campaign phases are left to those users who have a suitable license.

3.1 Special fields in the campaign data record

The fields you will know from other CAS genesisWorld data records are not described here, for example, **Start**, **End** or **Remind**.

These fields function the same way in other data records, with respect to the remind field, all participants of the data record or only the current user are informed. Marketing pro, however, uses special fields.

- The **Status** field describes the status (e.g. planned or active) of a campaign. Input assistance options are defined by the administrator in the Management Console.
- The **Domain** field is important to you if you replicate with CAS genesisWorld. A campaign can only be edited in one domain.

  You can select a different domain in which you edit the campaign. The campaign will then be set to read-only in the original domain.

  After replication, the campaign will be saved on the other domain and can be edited there.
- Enter the budget for the campaign with the corresponding currency in the **Budget** and **Currency** fields.

4 Executing campaigns

Campaigns are planned, executed and analyzed using the respective campaign data record tabs.

4.1 Planning campaigns

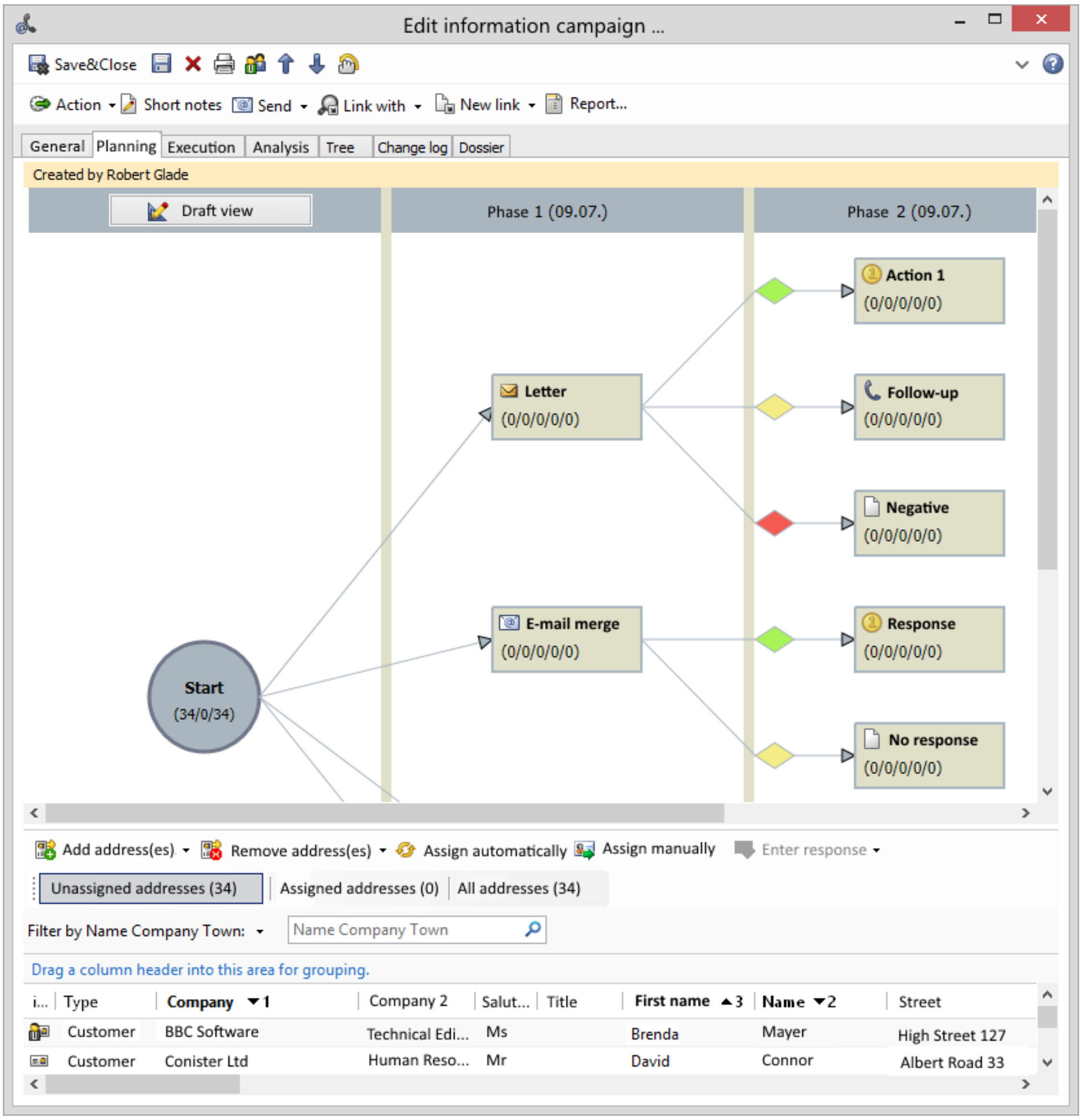
You organize and plan campaigns on the **Planning** tab of a campaign data record.

You may have already selected the addresses when creating the campaign. You can add or remove any addresses.

A campaign may include as many phases as you want. The phases are displayed in a graphical view. You can change phases and add additional ones.

For each phase, you define which actions you want to use in the campaign and which responses are possible. CAS genesisWorld includes actions like tasks, form letters, e-mail campaigns, phone calls or opportunities.

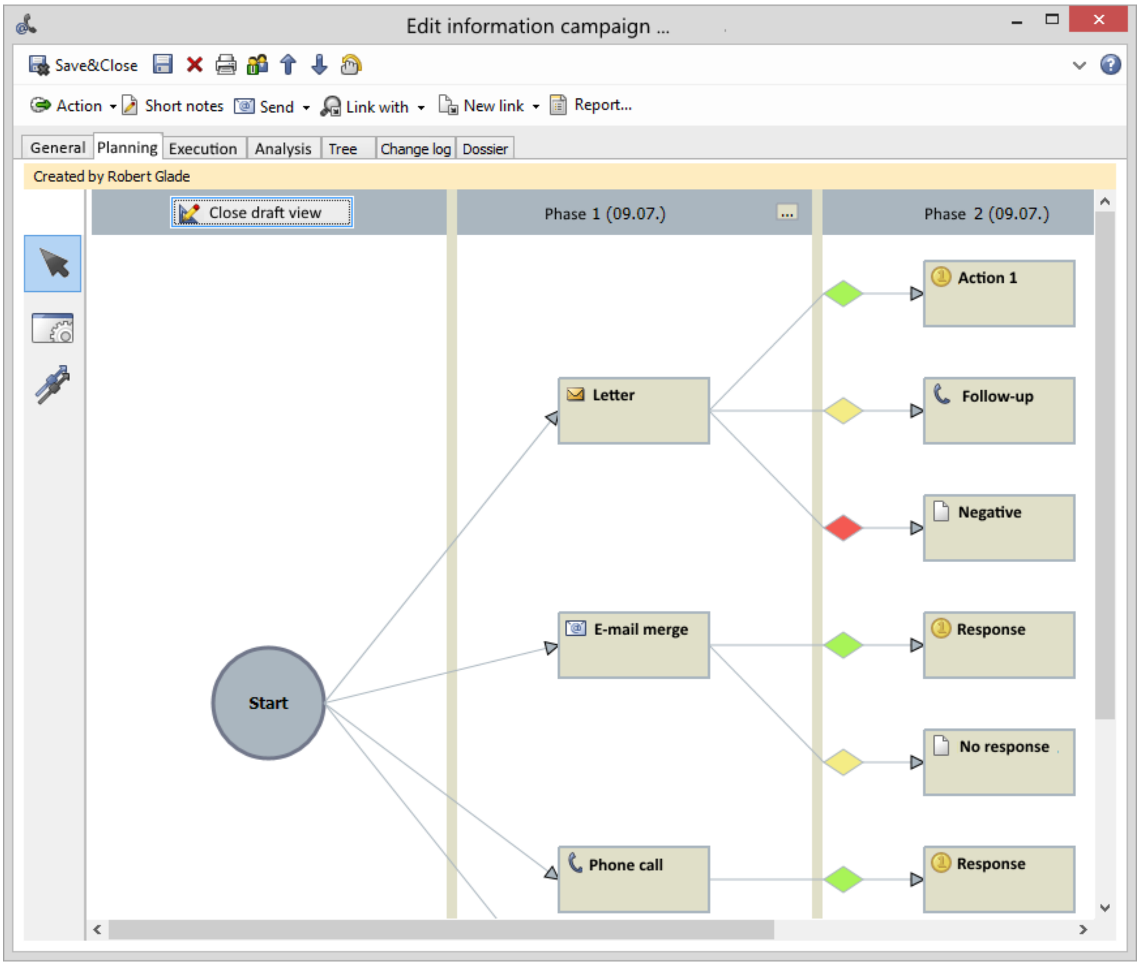
Additionally, you define own actions which have to be executed manually.



You can save costs for each of the different actions if you wish, you do this in the **Costs per contact**, **Fix costs** and **Expected turnover** fields , see chapter "Planning actions" on page 13.

Click **Draft view** to edit a campaign's phases and actions. This view displays icons for creating actions and responses for phases.

Addresses of a campaign are hidden in the draft view.



4.1.1 Editing phases

For the first phase, you define, at what time, and how addresses are contacted. If you create a second phase, you can draw on the results of the first phase when selecting addresses.

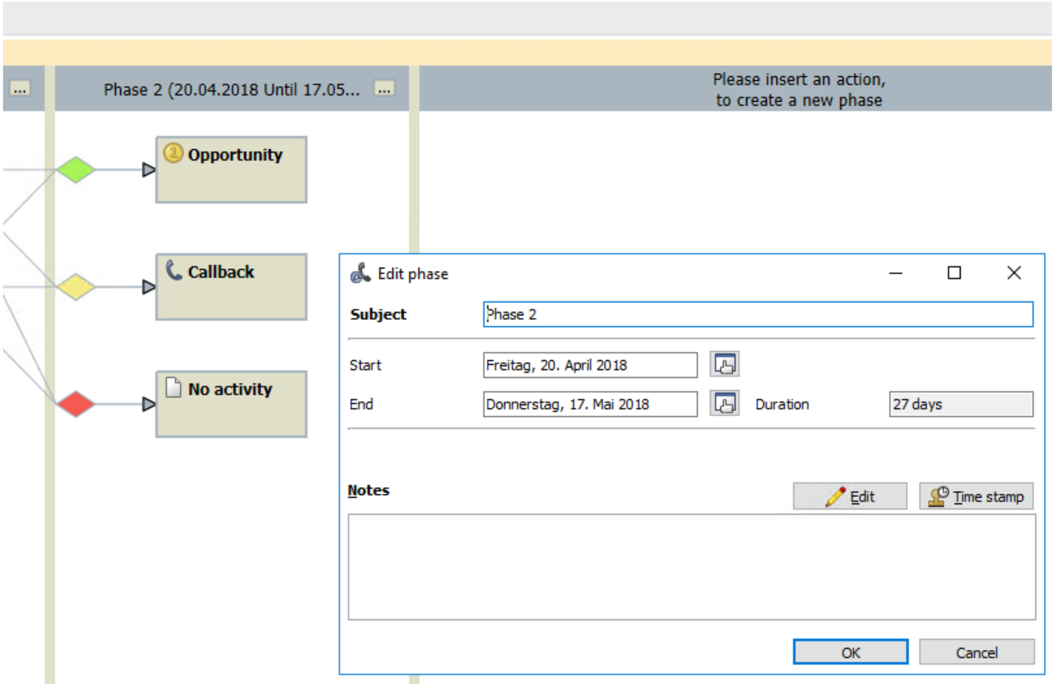
All recipients who have not responded in the first phase are contacted again in the second phase.

You can add an additional phase when executing a campaign. You can start the next phase after a specific period of time has elapsed or after you receive a particular response.

Example: If you have not heard from a recipient within a week after sending an e-mail, you can add him or her to the second phase manually.

If a recipient replies, her or she is also added to the second phase and immediately receives information material by post.

✓ Double-click the display of a phase or click the button next to the name of the phase. The **Edit phase** window opens.



- ✓ Enter the **Subject** to name the phase.
- ✓ **Start** and **End** date are also displayed in the **Planning** tab.
- ✓ In the **Enter an action here, to create a new phase** area, you can enter a new action to automatically create a new phase. The **Create action** window opens. Fill in the desired fields, see chapter "Planning actions" on page 13.

  The new phase will then be displayed and you can edit the new phase by double-clicking it.

4.1.2 Planning actions

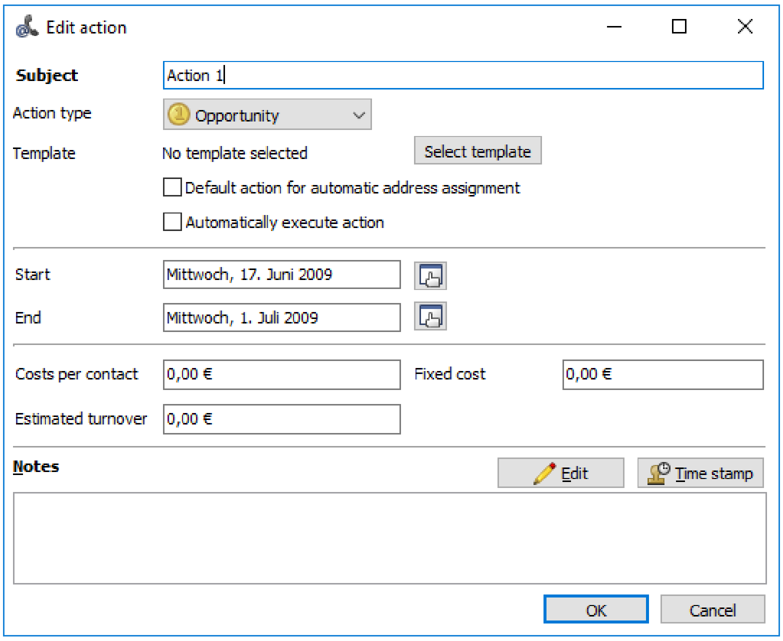
 Click this icon in the draft view and then click again in the column of the respective phase. The **Create action** window opens.

- ✓ Enter a **Subject** name under which you want to display the action in the **Planning** tab.
- ✓ Select a data record type as **Action type**. You can select the following data record types: task, document, e-mail, phone call, and so on.
- ✓ If templates for this data record type exist, click **Select template**. In order to adjust the template, click **Open template**.
- ✓ You may plan two identical actions in the same phase for the same communication channel, for example, e-mail campaigns. To do so, activate the **Default action for automatic address assignment** option for an action.

  If you assign addresses automatically, they are assigned to the default action.

This setting refers to the first campaign phase. During the course of the campaign, all further assignments to a follow-up action are made depending on the responses.

✓ If you enable the **Perform action automatically** option, then the action is executed automatically if an address has been earmarked for the respective action.



✓ The automatic action creates a new data record which is opened directly in CAS genesisWorld. You can save additional information to the newly created data record.

This enables a follow up action to be started automatically as soon as a contact's re-sponse has been saved.

✓ **Start** and **End** correspond to the phase that the action belongs to. Editable values of the phases are entered automatically.

The values stored in the **Start** and **End** fields, have to be within the time period for the associated phase.

✓ Enter **Costs per contact**, **Fixed costs** and **Expected turnover**. These values are taken into account for evaluations.

✓ Move actions or responses from one phase to another via drag and drop.

✓ To open an action or response to edit it, simply double-click it.

 This button switches the mouse pointer for selection.

4.1.3 Planning responses

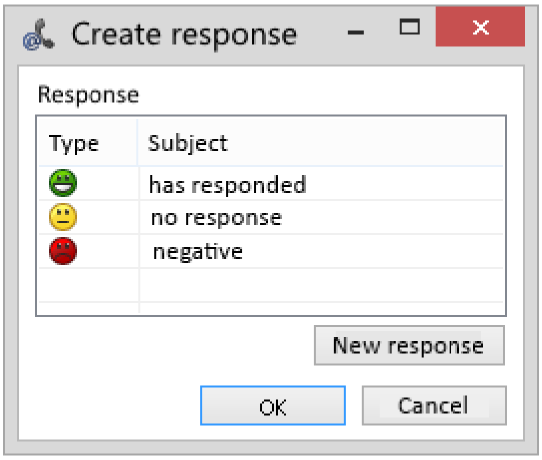
A response is the result of an action. A response is therefore set between two actions. A response is therefore set between two actions.

To define a response, both the preceding and subsequent actions have to exist. The preceding action could be, for example, an **e-mail campaign**.

✓ Define a follow-up action for each possible response.

 Click this icon and drag a line from the first action to the first response.

The **Edit response** window opens.



✓ Click the **New response** button and enter a new response.

✓ Select whether the response is positive, negative or neutral.

The response is displayed as an icon between the responses.

The classification of all responses as positive, negative or neutral allows you to evaluate all responses or several campaigns, even when the responses are named differently.

Possible responses are, for example, **Reply** as a positive response, **No reply** as a neutral response and **Unsubscribe from distribution list** as a negative reply.

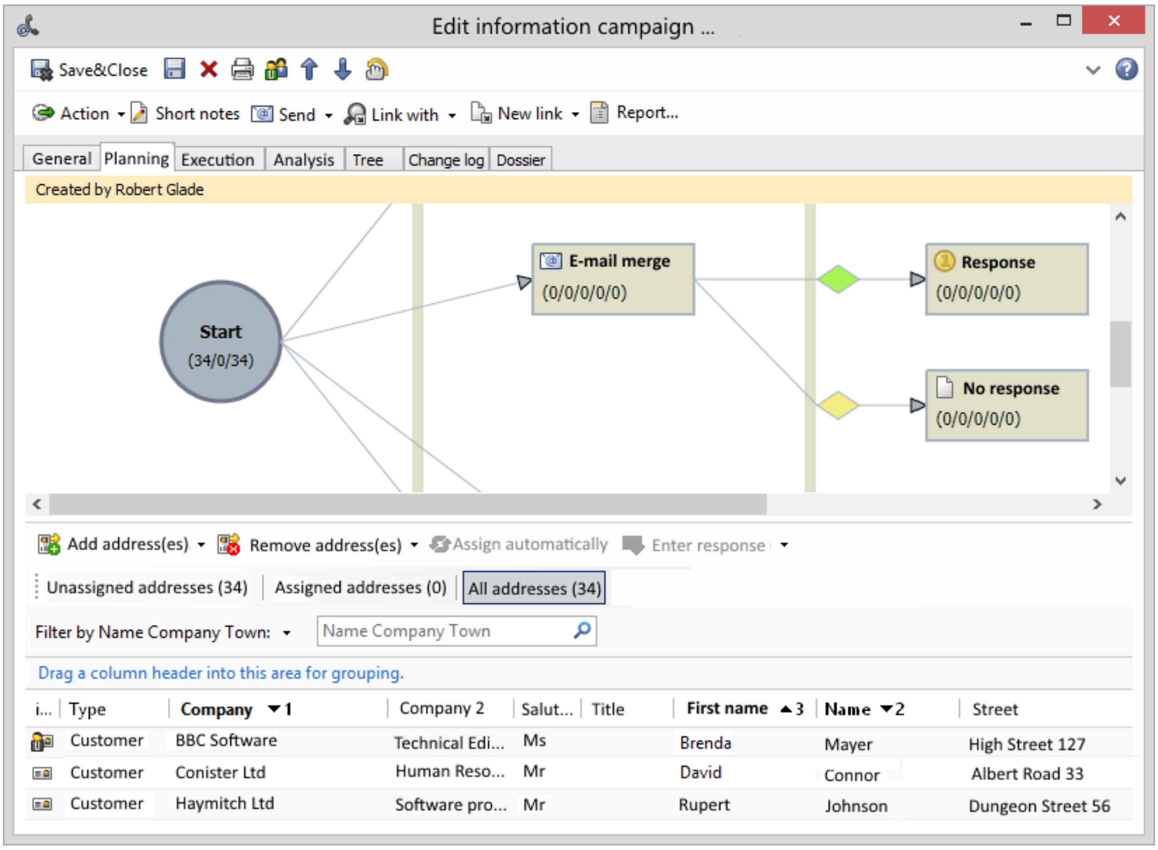
✓ If you double-click the icon displayed on the line, the **Edit response** window opens.

4.2 Assigning addresses

✓ If the draft view is still open, then you can click **Close draft view**. It is not possible to assign addresses in the draft view.

The lower section of the **Planning** tab displays all addresses included in your campaign. Use the buttons to define the addresses for a certain target group and assign the respective actions to the desired addresses.

Addresses can be assigned in different ways, for example, by using the buttons on the **Planning** tab or via drag and drop.



4.2.1 Segmentation

Defining a target group

You can select addresses as a target group or change the target group either when creating a campaign or in the **Planning** tab of a campaign.

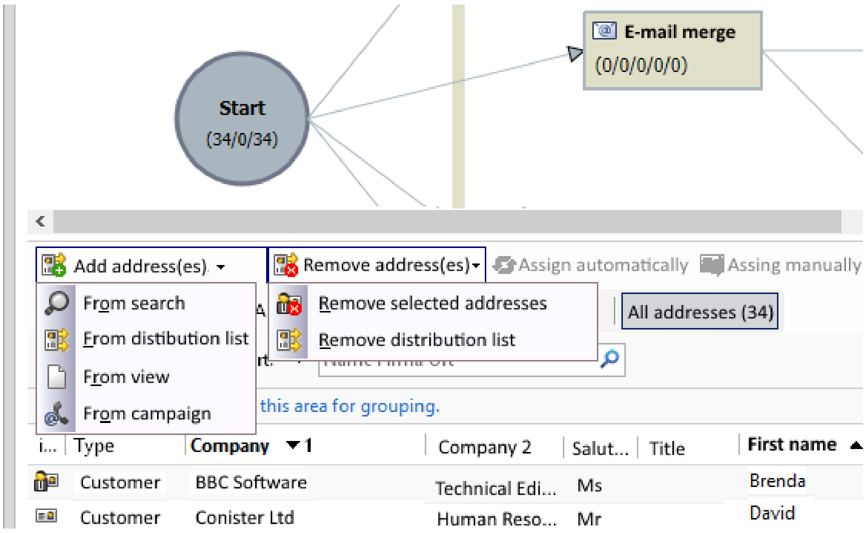
Once you have finished planning the campaign, this target group will remain unchanged regardless of further phases of the campaign. You can add more addresses at any time.

Addresses of a campaign are automatically linked with the campaign. You can go to the dossier of an address to see in which campaigns an address is or was included. **Campaign** tabs are also included in address data records, in which all the campaigns associated with this address are displayed

At the start, define the addresses you want to use for the **Start** of the campaign.

✓ Click **Add address**. Go to the drop-down list to insert addresses, for example, via a search, from a distribution list or from an existing campaign.

✓ Click **Remove addresses**. Go to the drop-down list to remove selected addresses or a distribution list from the target group.



Notes

You can change the target group for a campaign on the **Planning** tab by using the respective buttons. When addresses are added, they are automatically linked to the campaign, and when you remove them, the link is deleted.

This does not work vice-versa: if you link addresses with the campaign, they are not included in the target group.

This is why you will only see the **Campaign** tab in an address if the address belongs to the target group.

The thickness of the arrows shows how many addresses since the start have been transformed by actions to become responses. If you subsequently move addresses to other actions using drag and drop, the thickness of the arrows remains unchanged; however, they will continue to show the original path of the addresses.

Adding addresses to an action

Begin with the first phase **Start**. The Start icon displays 3 figures.

- The first number is the number of addresses that have not yet been assigned.
- The second number is the number of assigned addresses.
- The third number shows you the total number of addresses selected for a campaign.

In the lower pane of the tab, you will see three lists that correspond to the three numbers: **Unassigned addresses**, **Assigned addresses** and **All addresses**. A number in brackets shows you the number of addresses.

You have different options to assign addresses to an action.

✓ Click the **Assign automatically** button. Addresses are automatically assigned to the desired communication channel for an action.

If addresses could not be assigned, these addresses are moved to the **Unassigned addresses** list.

✓ You can also select one or several addresses and drag them with the drag and drop function to an action.

✓ Another option is to select addresses and click the **Assign manually** button. A window opens. Depending on your actions, you have different options to select from in order to assign your addresses.

The planning phase of a campaign is completed after you have assigned all addresses to an action, that is, all addresses are contained in the **Assigned addresses** list. You can define further steps on the **Planning** tab, see chapter "Planning campaigns" on page 10.

Alternatively, you can carry out more actions on the **Execution** tab, see chapter "Executing a Campaign" on page 19.

Hints on the Campaign tab in address data records

You will only see the **Campaign** tab in address data records if at least one address has been assigned to an active campaign. This ensures that only the currently relevant campaigns are displayed in addresses. You will find all linked campaigns and also be able to view completed campaigns in the dossier for an open address.

Users who do not have a Marketing pro license, have access to the Campaign tab in the address data record. These users can record responses from addresses and view the current status of an address in a campaign.

4.2.2 Status of actions and reactions

For each action and response, a sequence of numbers is displayed in the **Planning** tab, for example, 5/0/0/0/5. This number refers to the number of addresses in different statuses of the campaign:

- **Wait for action** Addresses are assigned to an action, but the action has not yet been executed.
- **Wait for response** An action has been executed for the address, but a response has not been entered yet.

  Responses to an action can only be entered if you have executed an action, that is, if the status is set to **Wait for response.** The corresponding addresses are then displayed in the **Wait for response** list.

  Go to the **Enter response** drop-down list to enter the response for one or several selected addresses. This function is also available on the **Execution** tab and in the data record window of an address.

- **Responded** A response has been entered for these addresses.
- **Conflict** Either an address was assigned to an action, but the channel type is not permitted in this address. Or an address is assigned to an action, but the required data is missing, for example, the street or the e-mail address.

  In this case, a window showing the respective addresses is opened. Change the addresses or delete them from the action.
- **All addresses** Indicates all addresses that were assigned to the action.

As the campaign progresses, the status of addresses change as they move through each of the phases, this is represented by the different number sequence.

If you click an action, the addresses including their status are displayed in the lower pane of the **Planning** tab.

If you click an action, you automatically activate the buttons for available address functions in the lower pane of the **Planning** tab.

✓ With the **Create distribution** list button, you open the dialog for **Creating a new distribution list**. You can create a specific distribution list for a campaign with the **All addresses** list.

  If you have selected an action and marked the assigned addresses, you can create a distribution list for each action.

✓ In the **All addresses** list, you can also activate the **Start follow-up campaign** button. This button opens the **New campaign** wizard.

4.3 Executing a campaign

After you have planned the campaign and added all addresses, actions are executed, responses entered, the campaign progress logged and the second phase set up if required.

On the **Execution** tab, each phase is represented on a separate tab.

❶ Actions

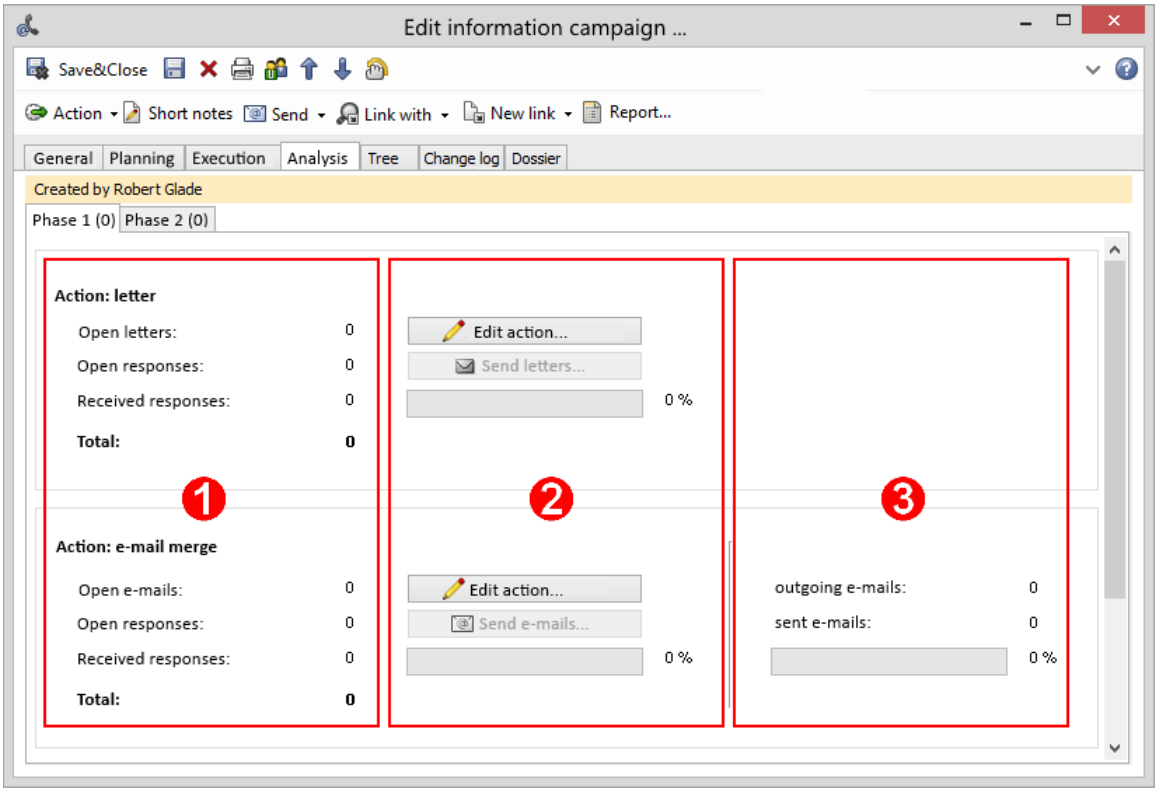
The actions of a phase are displayed in the first panel of a tab.

In addition, you will see the actions you want to execute in a specific order, after one another, displayed. **Open e-mails**, **Open letters**, and so on, shows you that these data records have not been created and/or sent for the displayed number of addresses.

The numbers tell you the number of addresses for which an action has been executed or a response entered.

❷ Activities

The second panel shows what you have to do for each action.



The **Send letters/e-mails, Create tasks,** ... buttons in the second panel are named matching the corresponding action. The button is disabled if no address was assigned to an action.

If you have defined individual actions, you must execute them manually.

- ✓ Sending **letters**, **e-mail** and **fax** opens the **Create document from** window. From this window, you can create a form letter or an e-mail campaign using a template and send it to the desired recipients.

  E-mail campaigns are sent by the Application Server and can be sent with a time delay if you wish. Progress is logged and is viewable by all authorized users, see the Online Help for Users, page E-mail default template.

- ✓ **Link data records** If you work with primary links, a window opens. Define whether a primary link to an address or an unspecified link is entered in a document data record

- ✓ The **Create tasks, phone calls, opportunities** function opens a window in which you can define whether a task or phone call should be created per address. In the process, you can create a data record for all addresses or a data record for per address.

- ✓ The **Open e-mails/letters** ... link opens the **Action: ...** list with all addresses of the re-spective action. If you have sent the e-mail or letter, created the tasks, and so on, se-lect **Mark action as completed** for the respective addresses.

- ✓ With the **Edit action** button, open the **Action: ...** list with all addresses. The list dis-plays an overview of all the addresses assigned to an action.

❸ Progress

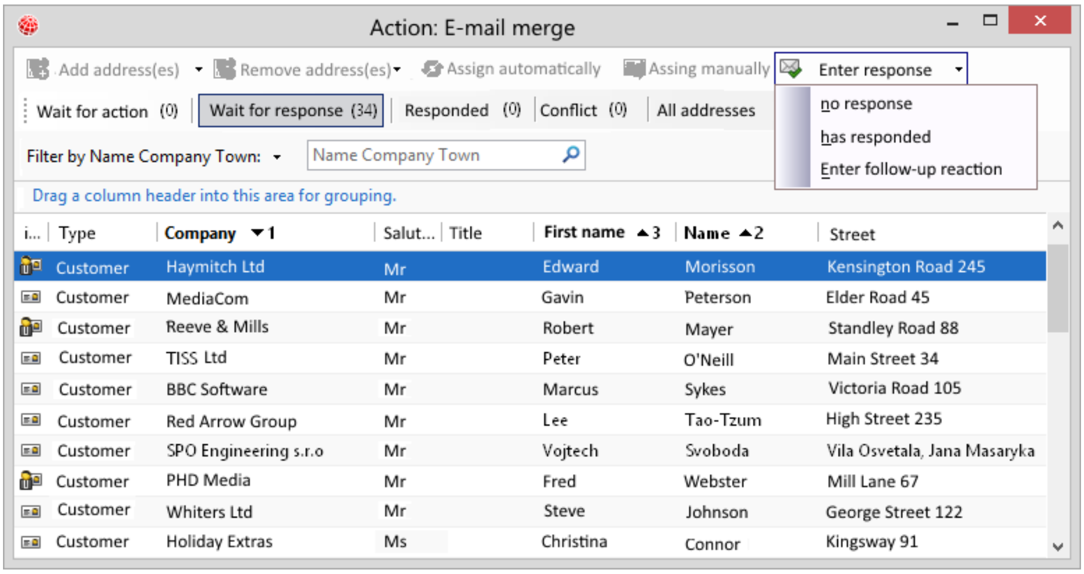
Progress for certain actions, for example, phone calls or e-mails, are displayed in detail in the third column. Click the displayed links to view a list of the respective data records. These can then be opened and edited in the window. The progress is calculated, for example, by taking into account all tasks with the editing status **completed**, all sent e-mails or conducted phone calls.

4.3.1 Open responses

If you use the buttons of the second column on the **Execute** tab to send e-mails, letters or to create data records, then you will see how many addresses have not yet responded, these are displayed in **Open responses** in the first column. **Open responses** is transformed into a link if the respective action was executed. The link is hidden if an action does not require any response.

✓ By clicking a link, you open a window with a list of addresses. Use the functions in the window to enter responses for addresses.

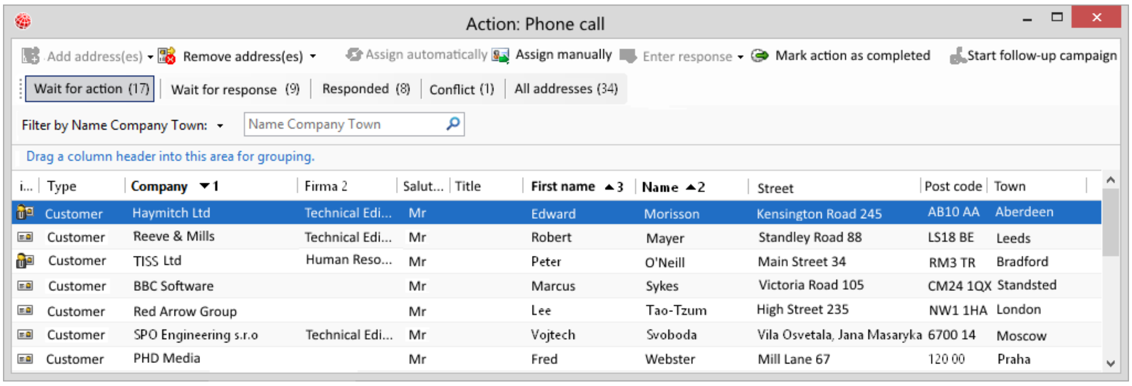
✓ This function is also available on the **Planning** tab and on the **Campaign** tab in an address data record.



✓ If responses were entered in the **Edit action** tab or in the **Campaign** tab in addresses, the number is displayed in **Responded**.

4.3.2 Lists of actions and responses

On the **Execution** tab, you can use different buttons and links to open a window which contains the list view **Action:...**, for example, using the **Open e-mails, Open letters or Open responses** links, or alternatively, using the **Edit action** button.



Multiple lists are displayed in the window.

Wait for action contains all addresses for which an action was not yet executed.

Mark the addresses and select **Mark action as completed** if you have sent the e-mail or letter, created the task, and so on.

Wait for response contains the addresses for which the respective action has not been entered yet.

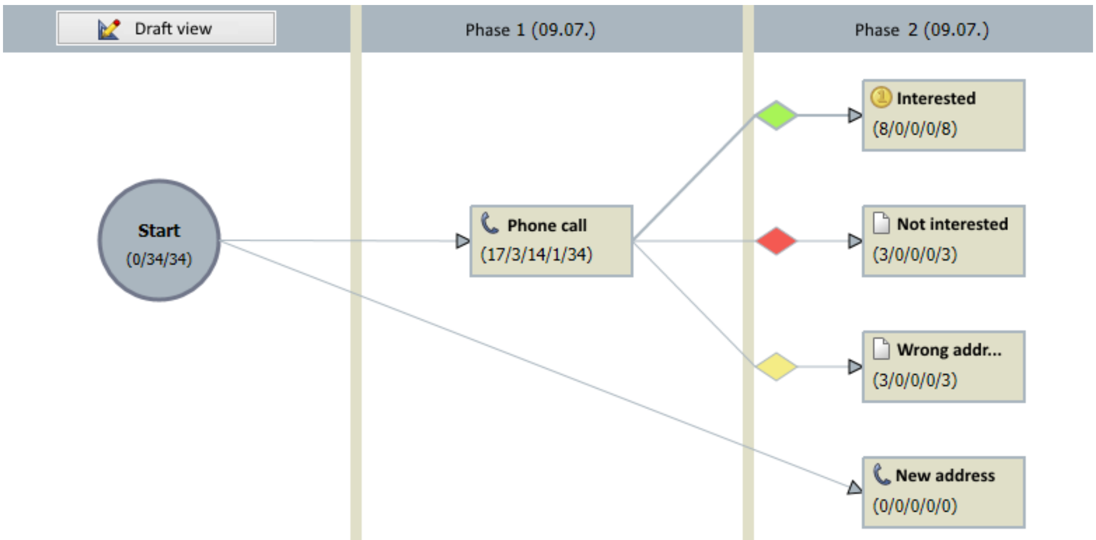
Mark the addresses and select **Enter response**.

Start follow-up campaign opens the **New campaign** window for a campaign. Use this function if you want to create a follow-up campaign for the selected address.

The list contains the same functions as the list of addresses in the **Planning** tab for the assignment of addresses.

4.4 Incorrect addresses and bounces

It is possible that during the campaign you realize that your target group contains addresses that are incorrect.



Having a strategy for dealing with returns or bounces, enables continuous improvement to the quality of your addresses.

One possible approach is shown in this example:

- ✓ In the first phase of the campaign, phone calls are made.
- ✓ The following possible reactions are recorded: **Interested** and **Not interested**.

  An additional "reaction" could be that the person being called is simply the wrong contact person for the topic in question.
- ✓ However, the person being called can often inform you whom the correct contact person for the topic would be.
- ✓ Before or during the execution of the campaign, you should create two special actions: **Incorrect addresses** and **New addresses**.
- ✓ The incorrect address is then allocated to the **Incorrect address** "reaction".
- ✓ The new address is then added to the target group at the start as this group always has to contain all of the campaign addresses.
- ✓ If the new address was not called, then the action had skipped the first phase of the campaign.

  And this is why the new address is allocated to the respective action of the second phase.
- ✓ The addresses in this phase can now be responded to separately in a third phase special action.

If instead of this procedure, you simply add new addresses from the original target group or a special action, you will have deviations from the campaign planning.

Without special documentation, these deviations can no longer be understood.

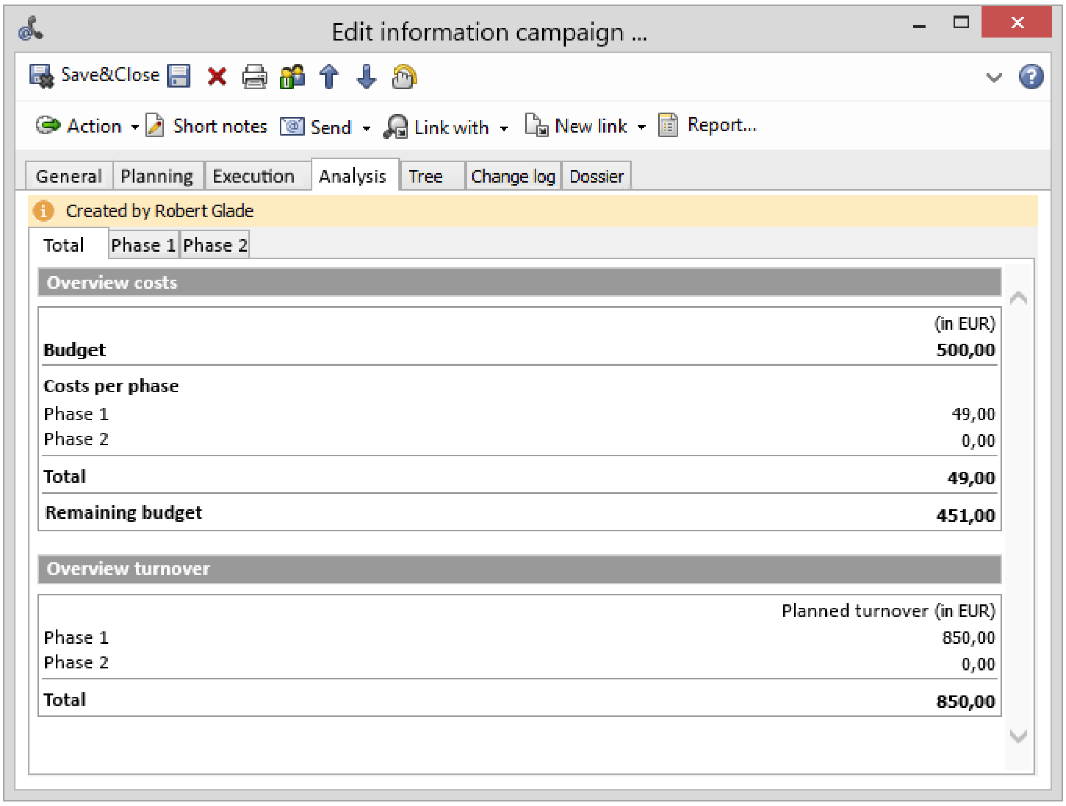
Following the procedure as outlined here, makes it easy to track and understand what special actions were carried out, for what addresses and why.

E-mail bounces can also be checked with special actions and you can also qualify addresses using a special action.

4.5 Campaign analysis

On the **Analyses** tab, the overall analysis for the whole "campaign" is displayed, each campaign phase is displayed separately on its own tab.

Costs in total or per action, the turnover and the number of the respective responses are analyzed.


Edit information campaign ...
Save&Close
Action
Short notes
Send
Link with
New link
Report...
General
Planning
Execution
Analysis
Tree
Change log
Dossier
Created by Robert Glade
Total
Phase 1
Phase 2
Overview costs
(in EUR)
Budget 500,00
Costs per phase
Phase 1 49,00
Phase 2 0,00
Total 49,00
Remaining budget 451,00
Overview turnover
Planned turnover (in EUR)
Phase 1 850,00
Phase 2 0,00
Total 850,00