Campaigns

What is a Campaign?

Campaigns are designed to control mass-communication to your **Contacts** and **Accounts** and can be distributed using Email, fax, letter or telephone media.

The **Campaigns** creation process is designed to be flexible to enable you to select and adjust recipients easily. The following options are available:

1. **Create a New Quick Campaign from a List:** create a new **Campaign** from any Gold-Vision List (see New Quick Campaign Tutorial)

2. **Create a Campaign Source:** Campaign sources provide a flexible, reusable list management system for campaigns. Sources can be created from any Gold-Vision or Lead Management list and can also be manually edited to refine the list of recipients. Recipients can be added or excluded from sources either individually or as a list to ensure communication is only sent to those you wish. Once created, sources can be used as inclusion or exclusion lists for marketing campaigns or the data can simply be exported for other means.

   Campaign sources support media type preferences that allow recipients to be litmus-tested for validity before they are even used for a marketing campaign. Invalid addresses and contact preferences are easily identified from an overview that highlights both positive and negative validity.

3. **Create Multi Stage Campaigns:** Enhanced campaign functionality supports multiple stages across a variety of mediums. Powerful follow-up rules allow for multiple tiers to suit your logic. The campaign overview screen allows users to visualise even the most complex structure all in one place.

   Campaigns stages, runs and follow-ups can be planned in advance and executed as required. The stage tier system allows follow-ups to be created based upon the outcome of previous stage data. For example a follow-up could be based on a positive response to a phone call, a click on an email or website, a new sales opportunity, or even simple changes to the record data itself.

   The campaign run system ties in with Gold-Vision Connect to support visual marketing that can be traced and reported on. Follow-up activities can also be created for account management or other duties.

   The campaigns functionality combines both standard Gold-Vision data and Lead Management to offer the same powerful functionality from both data sources

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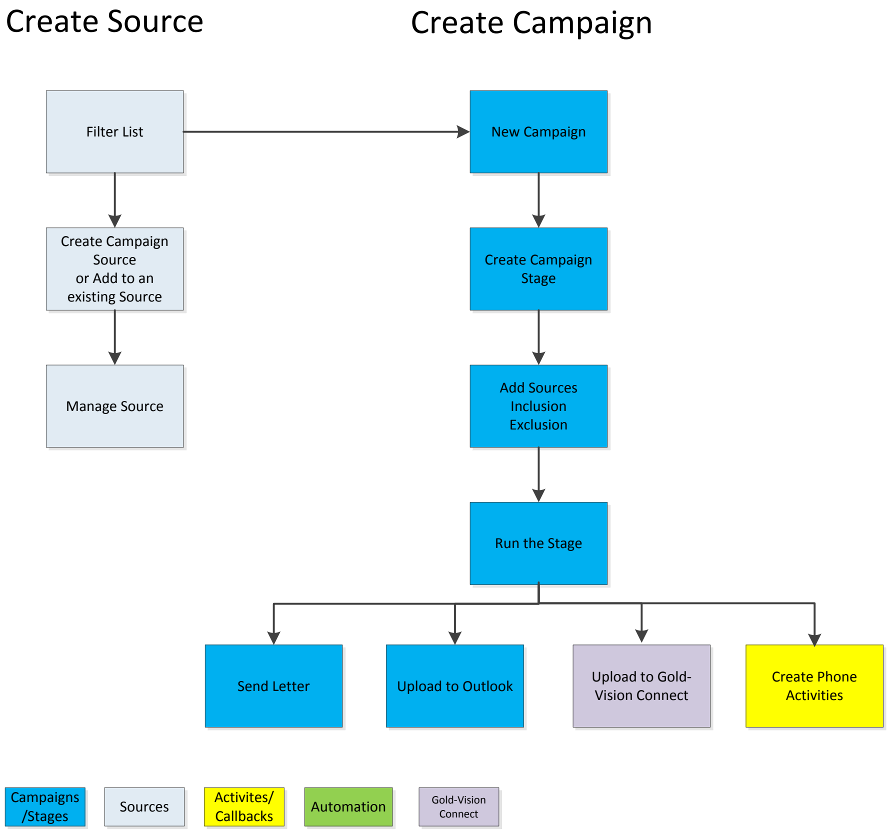
Campaigns


Create Source
Create Campaign
Filter List
New Campaign
Create Campaign Source or Add to an existing Source
Create Campaign Stage
Manage Source
Add Sources Inclusion Exclusion
Run the Stage
Send Letter
Upload to Outlook
Upload to Gold-Vision Connect
Create Phone Activities
Campaigns /Stages
Sources
Activites/ Callbacks
Automation
Gold-Vision Connect

Campaign Source

➢ Creating a Gold-Vision Campaign Source

Campaign sources provide a flexible, reusable list management system for campaigns. Sources can be created from any Gold-Vision or Lead Management list (see below) and can also be manually edited to refine the list of recipients. Recipients can be added or excluded from sources either individually or as a list to ensure communication is only sent to those you wish.

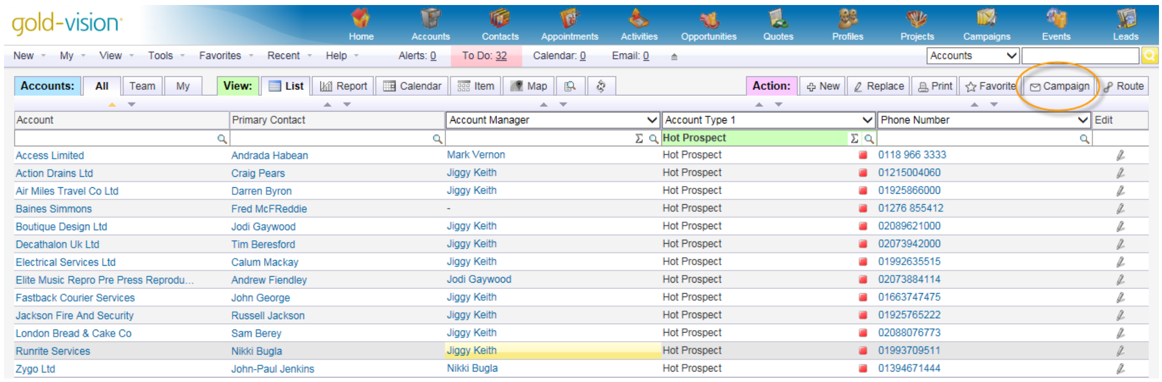
Once created, sources can be used as inclusion or exclusion lists for marketing campaigns. For example you may wish to send an offer to your Prospects but exclude anyone who has an open opportunity.

Note – sources from Gold-Vision and Lead Management cannot be used in the same Stage.

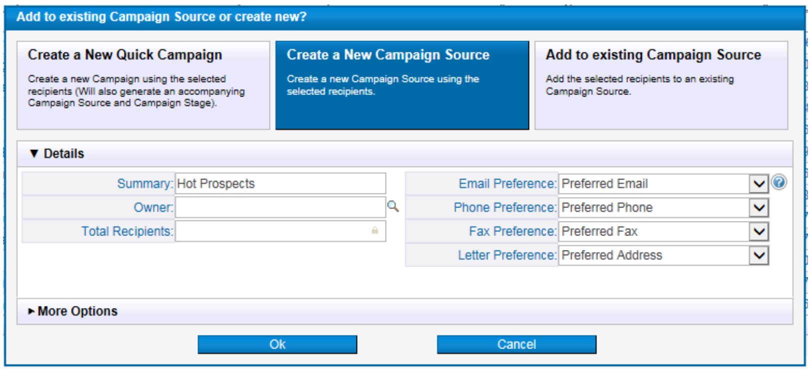
Invalid addresses and contact preferences are easily identified from an overview that highlights both positive and negative validity. .

From a main Gold-Vision screen
Click on View and select required Gold-Vision item, e.g. Accounts
OR: Click on the Icon on the top menu to select the required Gold-Vision item

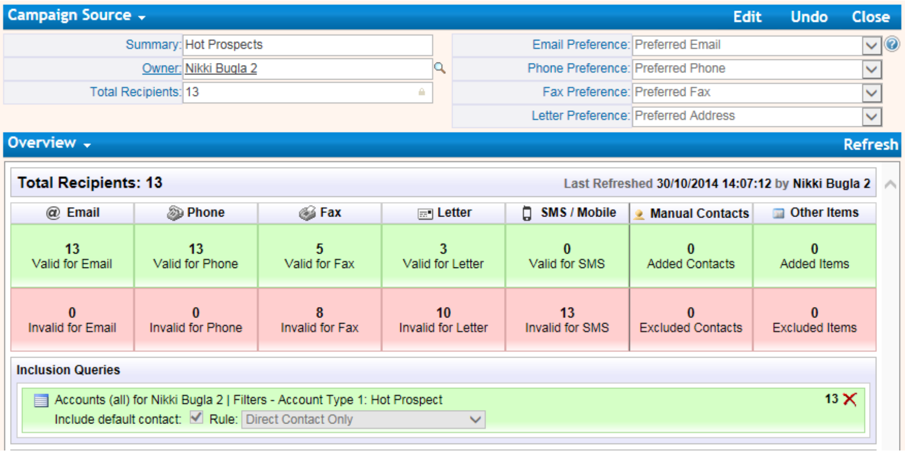
Filter the List as required for the Campaign Source that you wish to create.
For example the following **List** has been filtered, and all Hot Prospects have been selected:



Click the Campaigns Tab and select Create a New Campaign Source, enter a name for the Source, click OK



Open the Campaign Source to review the recipients.

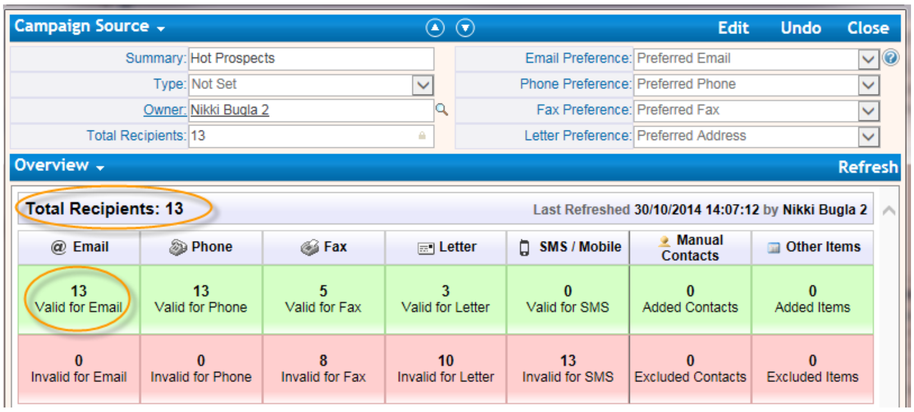


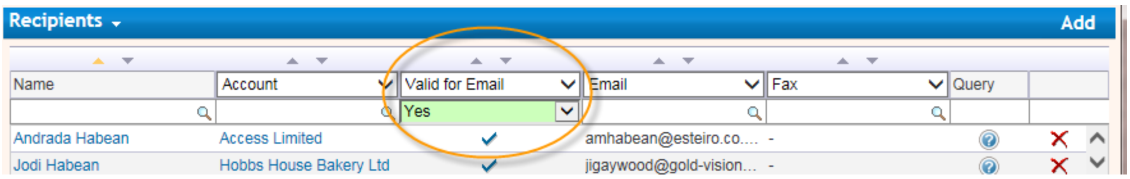
Note – by default:
The source will include the '**Direct Contact'** eg Primary Contact if list of accounts, Opportunity Contact if list of Opportunities. (Other options see below)
The source will include a **default contact** i.e. even if there is no Primary Contact for the account a recipient will still be included

Invalid for – e.g. missing email address/phone number, unsubscribes etc.,

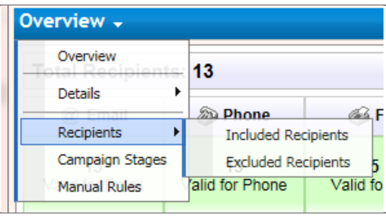
Reviewing Recipients

There are several ways to view recipients in a Campaign Source:
To view ALL recipients click Total Recipients.
To view all recipients valid for Email click as below





Or from the Campaign Source Overview menu
Select required Recipients list



Reasons for the Recipient being Invalid:

- Missing Email Address for the Contact
- Invalid Email Address - no @ included or incomplete domain within email address
- **Incomplete Address**: no Street Address 1 and/or Town/City for a Letter Campaign
- **Missing Phone Number** for a Telephone Campaign
- **Missing Fax Number** for a Fax Campaign
- **Contact Preferences** is set for the Contact to not receive the chosen Campaign Medium

or if the recipient has Unsubscribed from a Connect Mailshot.

To update the details for an Invalid Recipient - Click on the Name of the Invalid Recipient
This will open up their Contact record - Click **Edit** and update details such as an email address.
Once the new Contact Record is saved the contact will automatically transfer from being **Invalid** for the Campaign Type to being **Valid**.

Included Recipients List of all Recipients who have been Included in the Source

Excluded Recipients List All recipients who have been Excluded from the Source

Recipients will not be duplicated in a Campaign even if they have been added from multiple sources

Click the icon to see which source(s) the recipient is a member of.

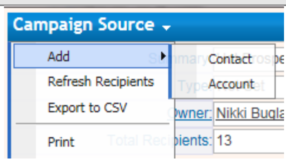
Contacts can be removed from the Campaign Source by clicking the Exclude Cross against the Contact. You will then need to Refresh the recipients.

Adding Recipients to a Campaign Source

Adding Individual Recipients:

Contacts may be added individually
From the **Campaign** Source Menu
Select Add- Contact or Account

Once Contacts or Accounts have been added you will need to refresh the recipients to update the Campaign Source.



You can **Filter** to search for **Contacts** using the Search Helper or Power Search options.
Click on the **Contact** name to add as a **Recipient** to your **Campaign**

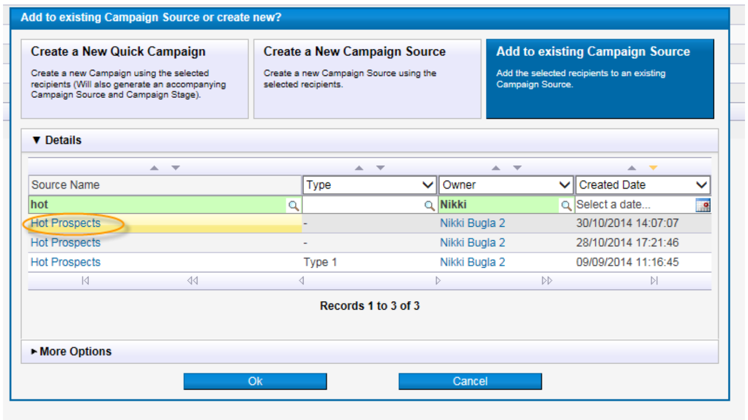
Use the Column Drop Downs to refine your search and enable you to add required Contacts quickly.
Select one of these contacts to add to your list.
The Valid Recipient list will show this as a **Manually Added Recipient**.

(Please note contacts cannot be added to Lead Sources manually)

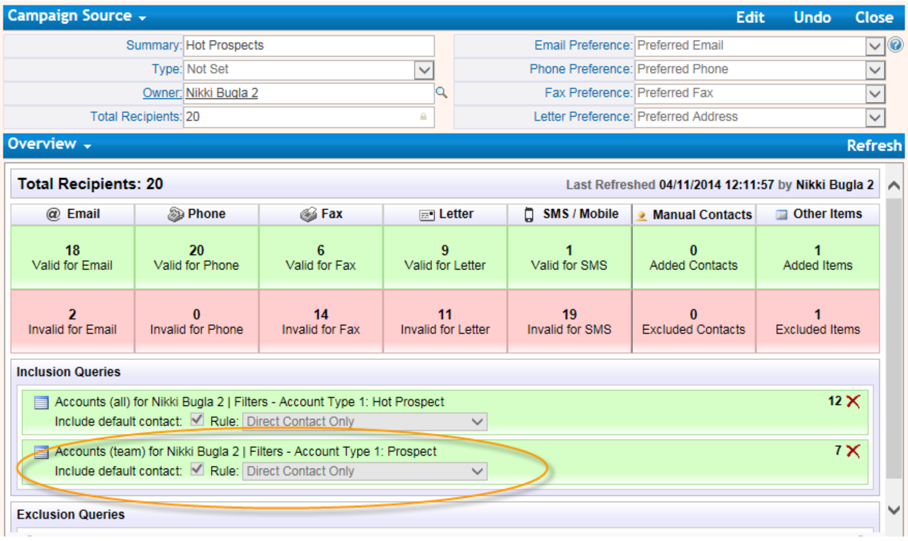
Adding Groups of Recipients:

Contacts may be added as a group from a filtered List

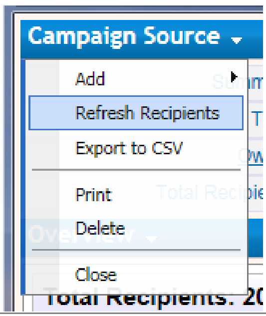
First create the Filtered List, Click the Campaign Icon. Select Add to Existing Campaign Source, search and select the Campaign Source, click OK.



Refresh the recipients. The Campaign Source will now show the Two sources and all the Recipients

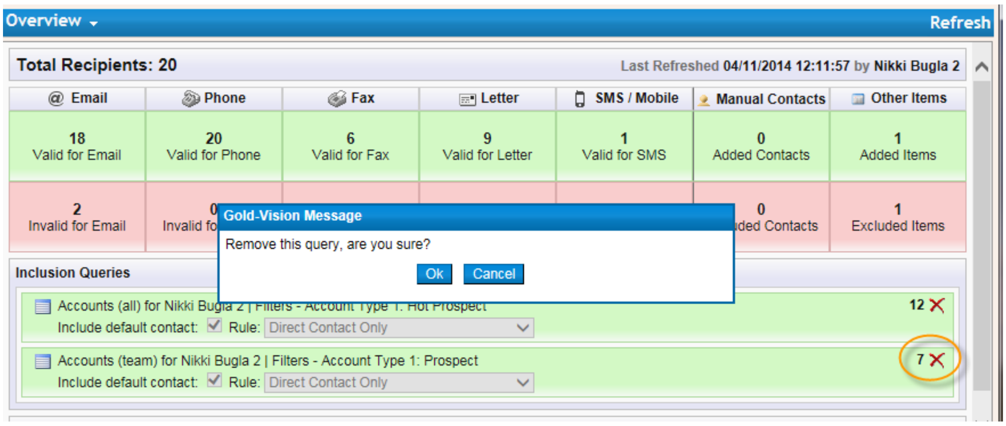


➢ Refreshing Campaign Sources

At any point before running a **Campaign** you can refresh the **Campaign Sources**	
From the **Campaign Source** menu Select Refresh Recipients	

Deleting Sources

Click the Delete Cross to delete an Inclusion Query/source included

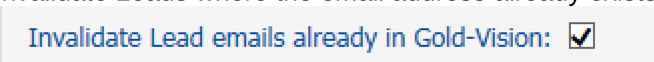


Creating a Leads Campaign Source

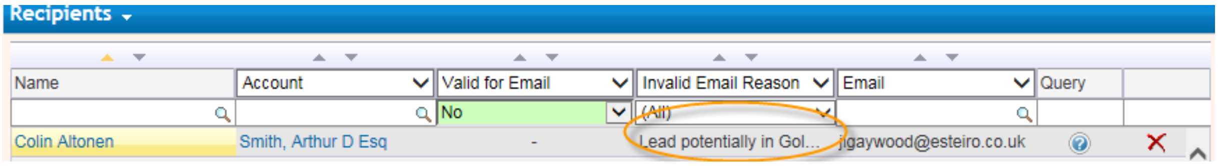
Sources can be created from a Lead list in the same way as above.

Adding Leads to a Source: Please note – Additional recipients can only be added from the list view of Leads (there is no option in the Campaign Source to add Recipients or in the Lead Record to Add to a Campaign Source.

Invalid Recipients – there is an option in the Admin Console (Lead Management Settings) to Invalidate Leads where the email address already exists in Gold-Vision.



Leads will show as Invalid For Email with the reason Lead Potentially In Gold-Vision

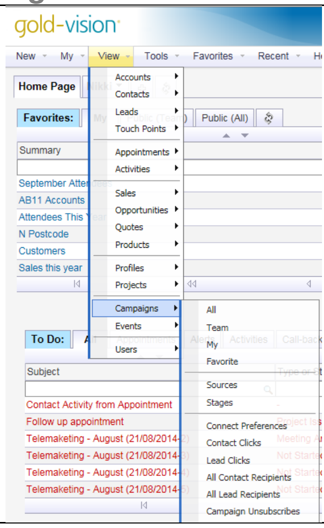


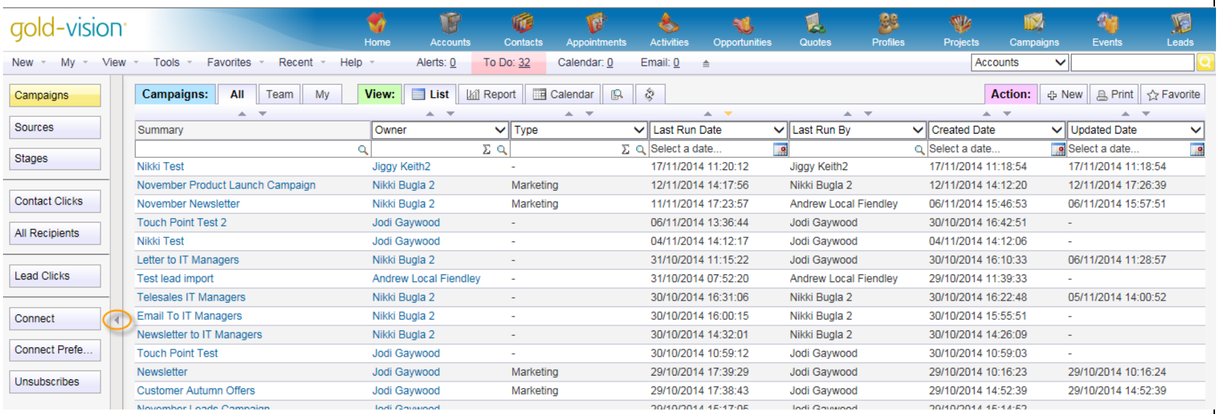
Accessing Campaigns

Viewing all Gold-Vision Campaign Records

You can view all Campaigns created from your Gold-Vision main page:

Or from the View Menu





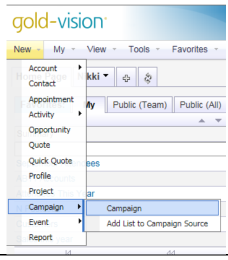
The menu on the left hand side can be hidden by clicking the arrow.

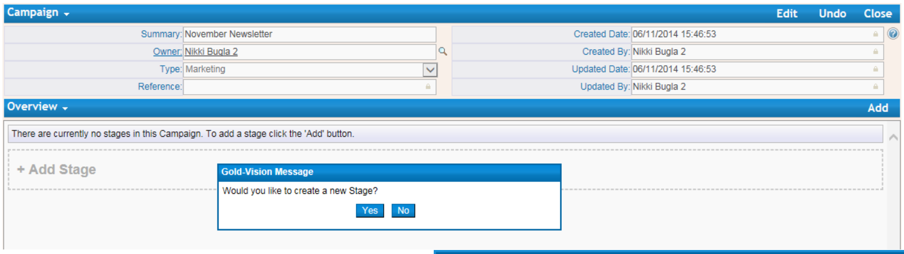
Note – All the above options refer to New Campaigns (Legacy Campaigns are accessed via the View → Campaings menu.

Creating A Campaign

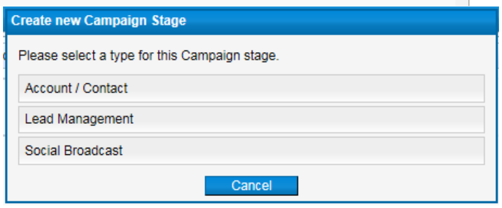
Defining your Campaign

As well as creating a New Quick Campaign, you can create a Campaign, add one or more Campaign Sources and then run the Stage





Adding a Stage



Define your Campaign and click to add a Stage

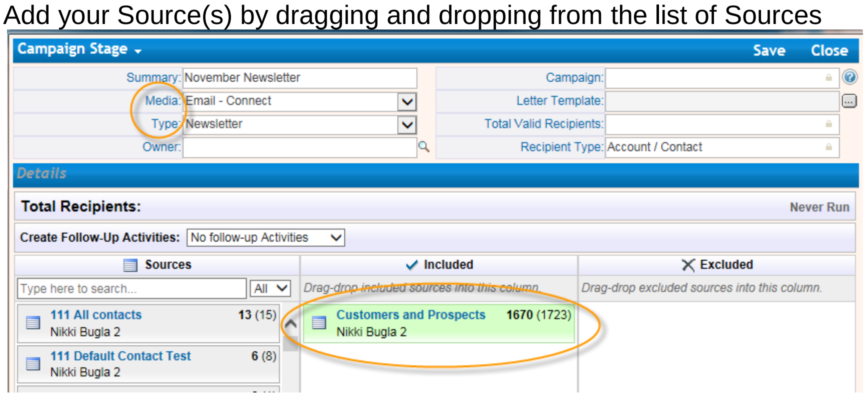
Select the type of recipients for this Stage

Define your Stage by adding the following:

- Media – Email/Letter etc
- Type – select from the dropdown list

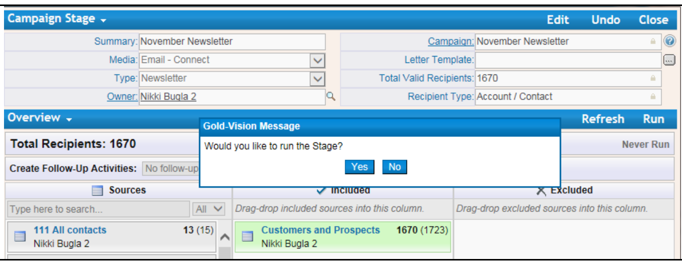
Adding Sources

Add your Source(s) by dragging and dropping from the list of Sources



Excluding Sources
You may wish to Exclude certain sources from your Campaign Stage, this can be done by dragging the source to the Excluded column

Click Save – this will validate the Recipients for this particular Stage (eg valid email address) your will then be prompted the run the Stage

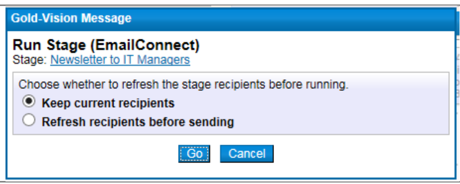


➢ Running the Campaign Stage

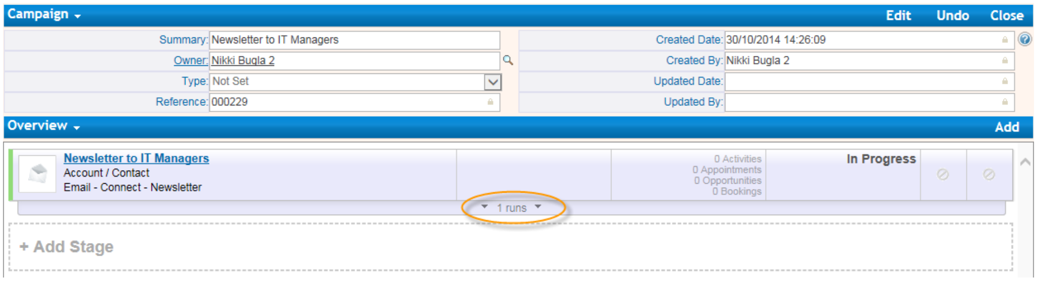
Email – Connect

Click the Yes to upload the recipients to Connect

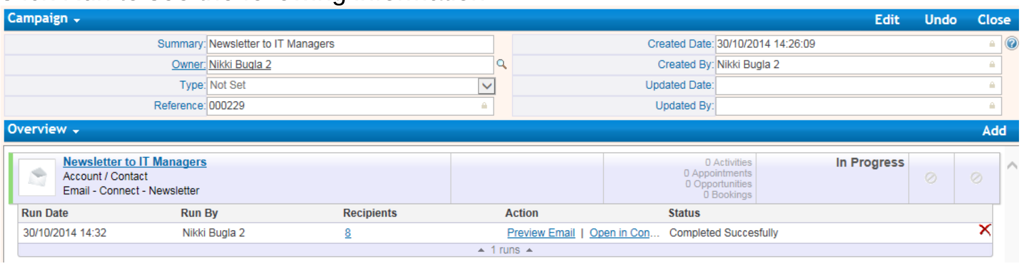
You will be asked if you want to refresh the recipients.In this example they do not need to be refreshed.



The recipients will be uploaded to Connect.



Click Run to see the following information

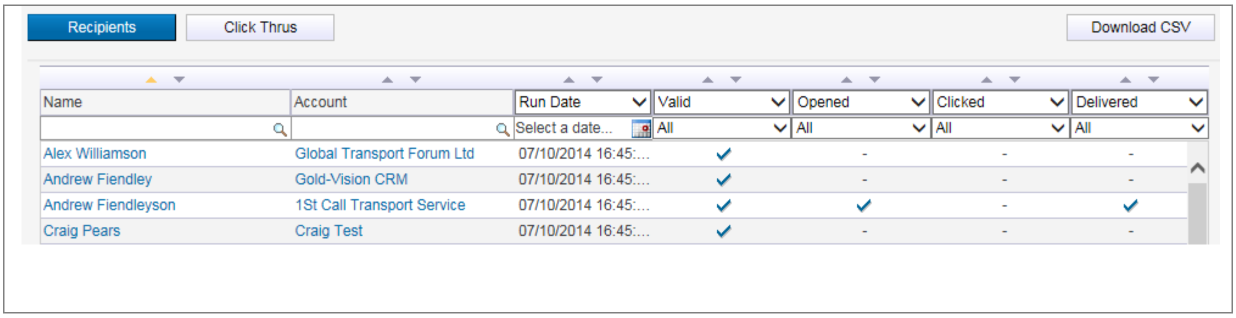


Recipients – once the Mailshot has been sent, view recipient click through data.

Preview Email – once a Template has been applied, click to Preview the Mailshot.

Open in Connect- to work on your mailshot.(you will be prompted to enter your User Name and Password if you do not already have Connect open.

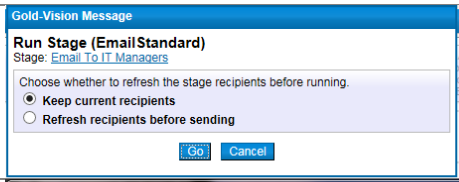
Once the mailshot has been sent you will be able to see all the run and click thru data


Recipients
Click Thrus
Download CSV
Name
Account
Run Date
Valid
Opened
Clicked
Delivered
Select a date...
All
All
All
All
Alex Williamson
Global Transport Forum Ltd
07/10/2014 16:45:...
Andrew Fiendley
Gold-Vision CRM
07/10/2014 16:45:...
Andrew Fiendleyson
1St Call Transport Service
07/10/2014 16:45:...
Craig Pears
Craig Test
07/10/2014 16:45:...

Email – Standard

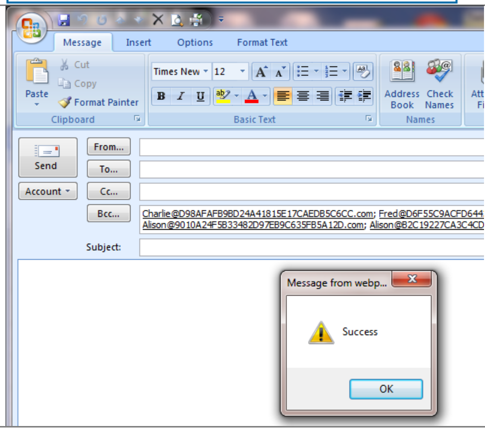
Click Yes to create an Outlook Email

You will be asked if you want to refresh the Recipients, in this example they do not need to be refreshed.

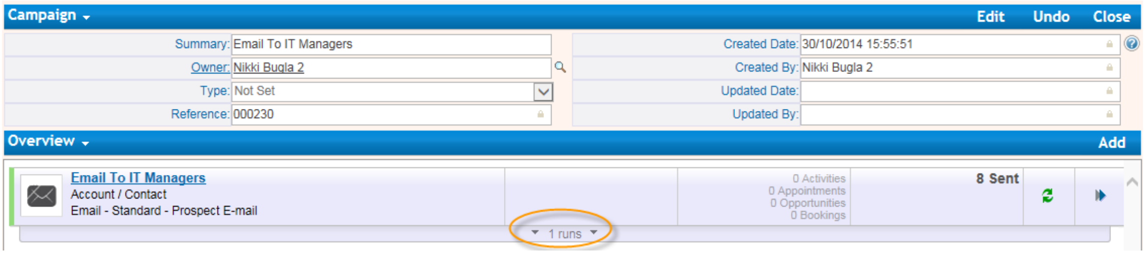


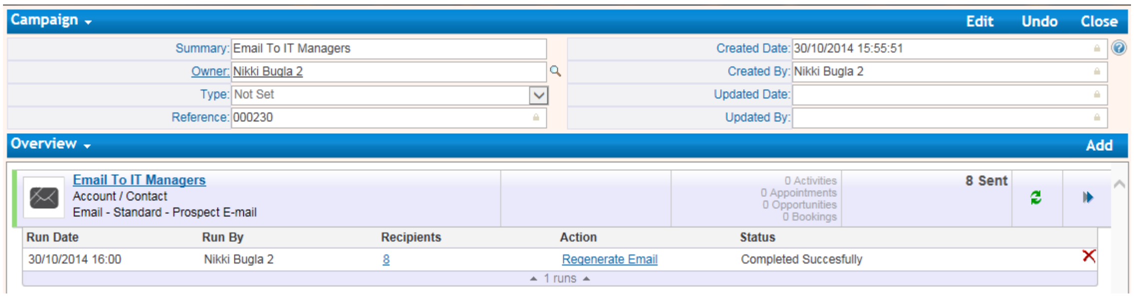
An Outlook email will open with the Recipients in the BCC section.

Add your email subject and body, click send.



Once the email has been sent, click on Runs to see the recipients who were included in the run.



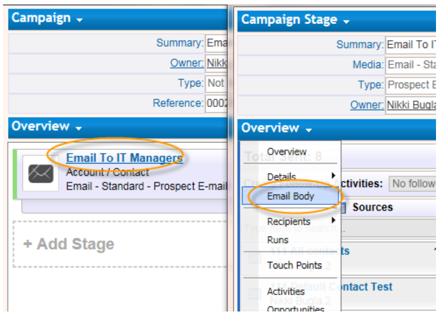


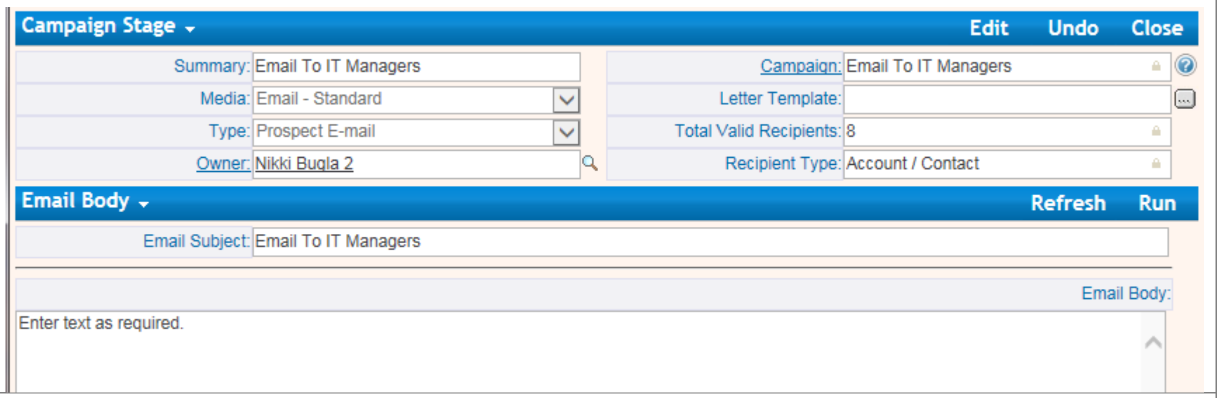
Option 2

Adding the Email Body to the Gold-Vision record

Click the Stage (eg Email to IT Managers) and from the Overview menu select Email Body

Click **Edit** to add Subject and Body of the Email. Save – further editing can be made as required, click **Run**. This will open an Outlook email as above.

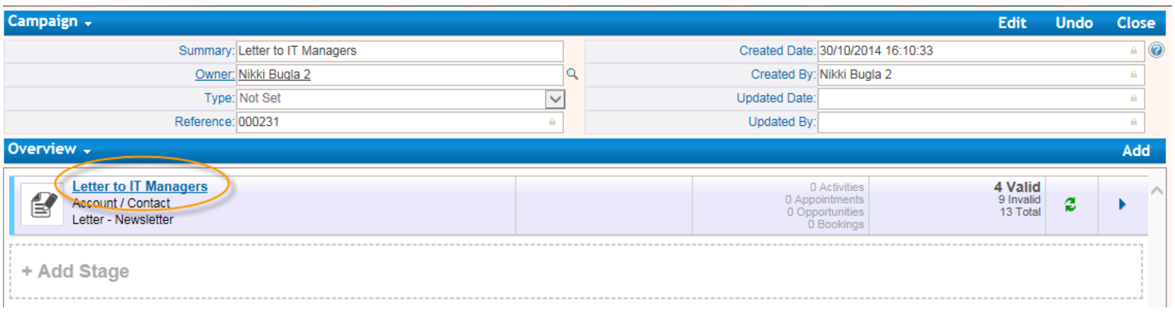




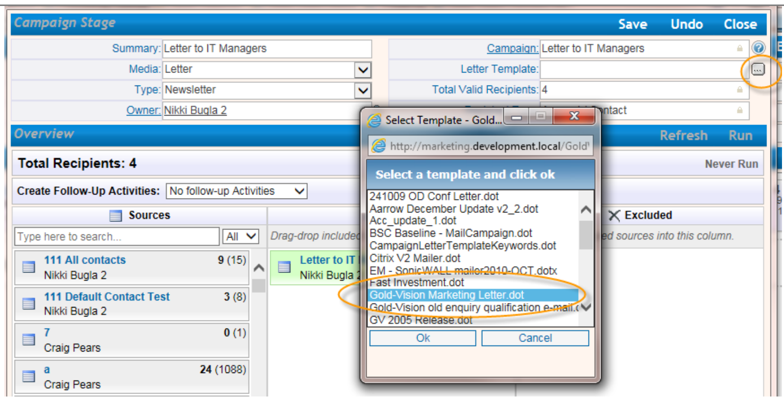
Letter

Campaign letter templates need to be prepared for use, this is simply a Word document template saved to the GVTemplates shared folder.
This process is documented in the Administration Console Guide, alternatively contact your Account Manager for further assistance.

You now need to select a Letter Template. Click the **Campaign Stage**

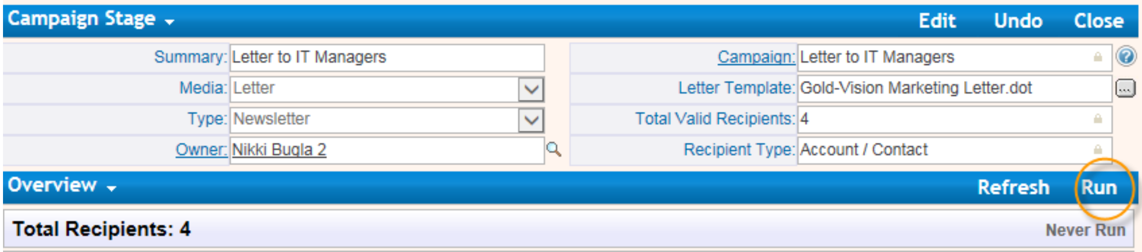


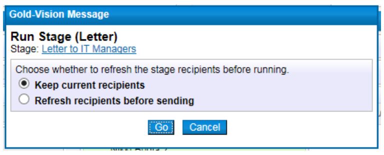
Click **Edit**, click the Template Icon and select a Template



The Default Salutation is Sir / Madam which will act as default if no Letter Salutation is set for a Contact

Click **Run .** You will be asked if you want to refresh the Recipients, in this example they do not need to be refreshed.

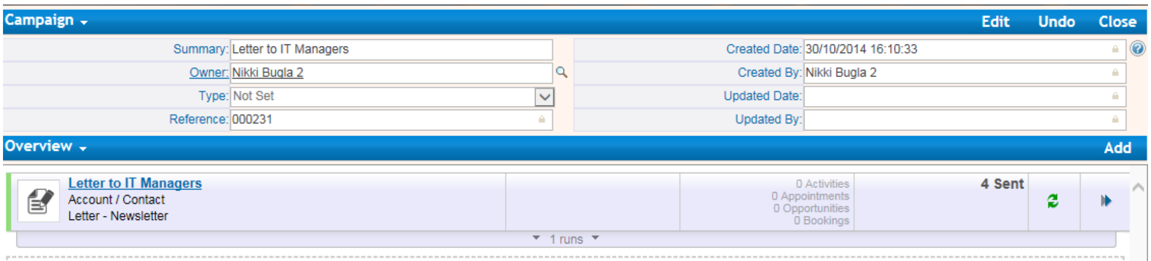


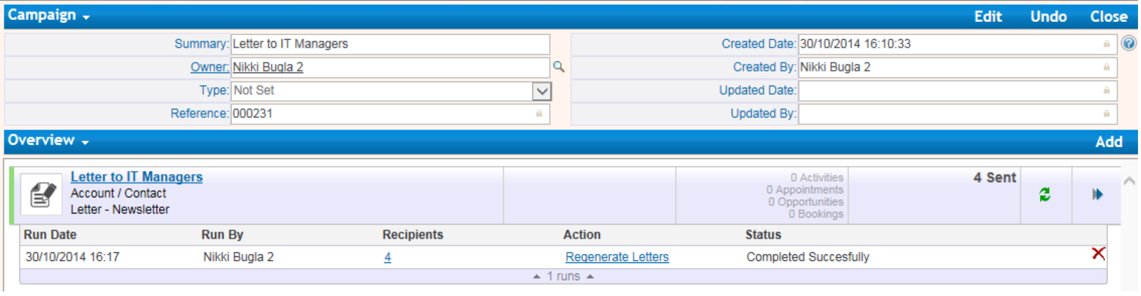


Word will open and a Letter will be created based on the Template you selected for each of the campaign recipients.

To produce the Campaign Letters, click Print

Once the email has been sent, click on Runs to see the recipients who were included in the run.



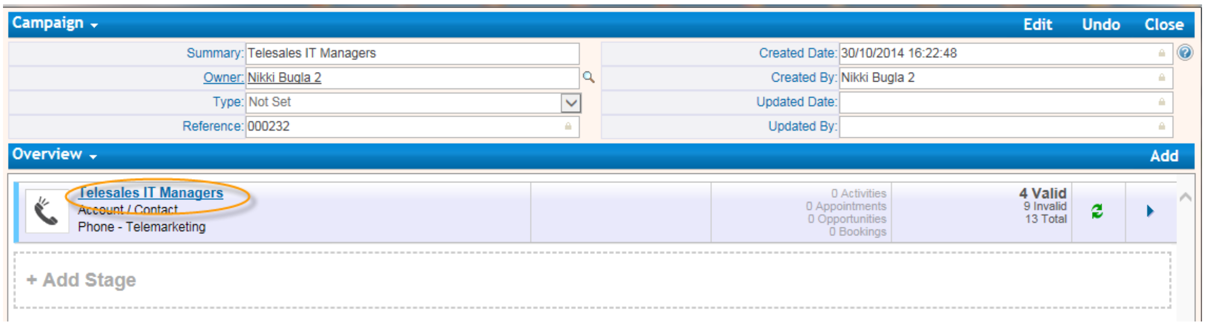


From here its possible to regenerate letters if required.

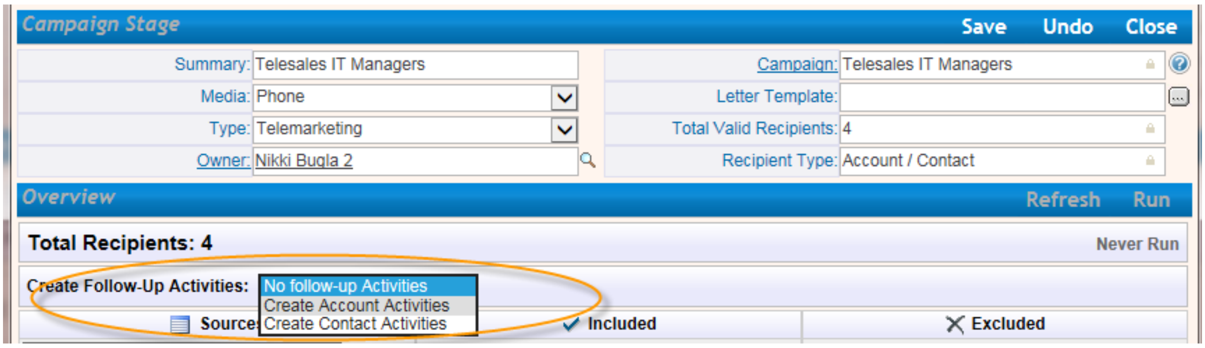
Phone

Campaign Activities can be created when a Campaign is run, for example as a follow up to an email or a letter Campaign or you they could be used to create a Telesales Campaign, creating activities for users to call a recipient.

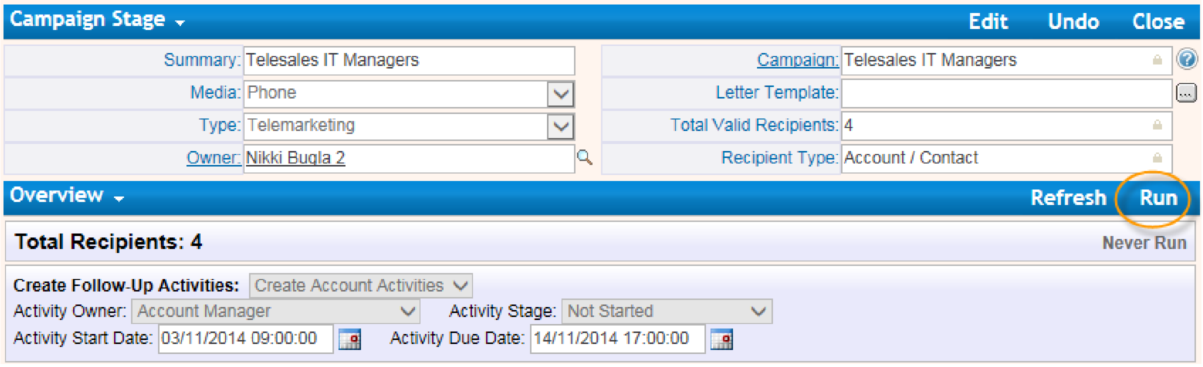
Campaign Activities allow you to monitor the success of a Campaign by the changes in the Campaign Activity statuses. For example, a company may have five stages for a Campaign Activity (Campaign sent, Response received, Demonstration arranged, Evaluation version despatched and Order Placed). Looking at the Activities list and filtering to show the Campaign activities under each of the five stages will show the progress and success of a Campaign.



Click Edit and select Create Follow Up Activities (either Account or Contact activities)

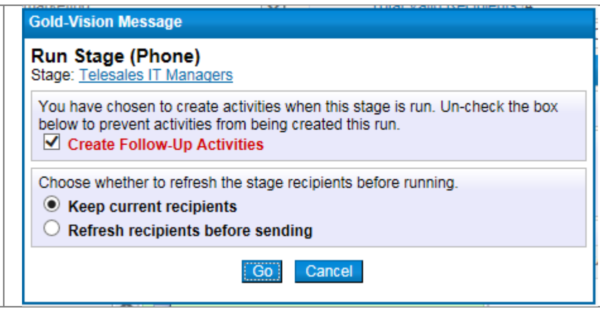


Select the Activity Owner, Activity State, Start and Due Date then run the Campaign Stage



Click Run

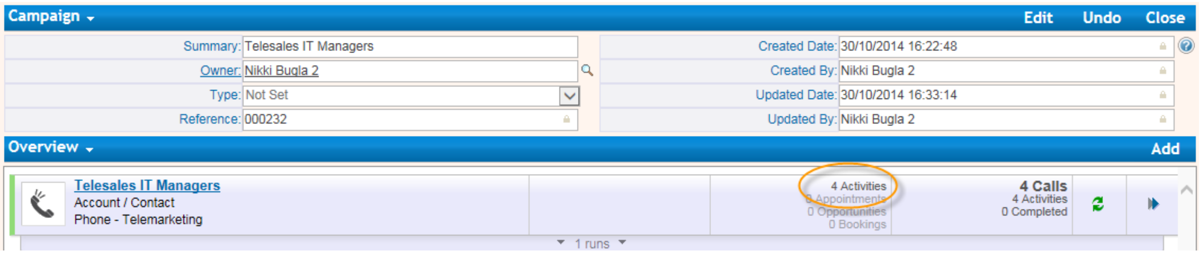
This message asks you to confirm that you want to create the activities. You will be asked if you want to refresh the Recipients, in this example they do not need to be refreshed.

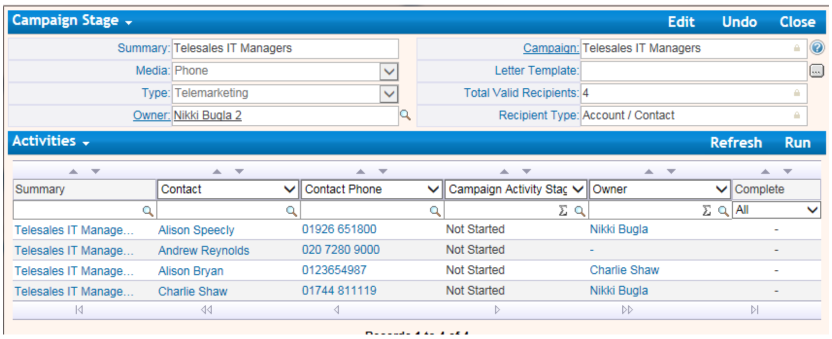


The Acvitities will then be created.

Close the Stage and return to the Campaign record.

Click Activities to view the Activities which have been created:

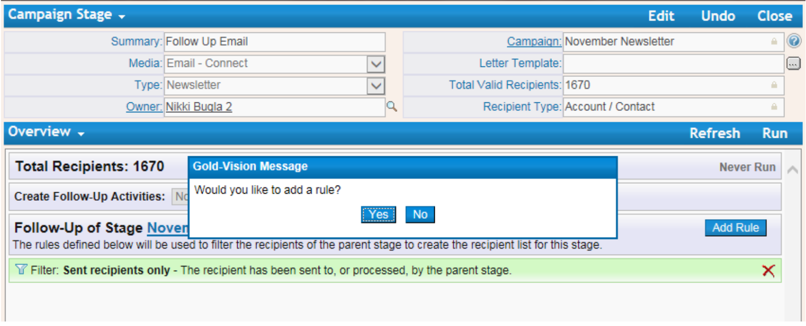




Follow Up Stages

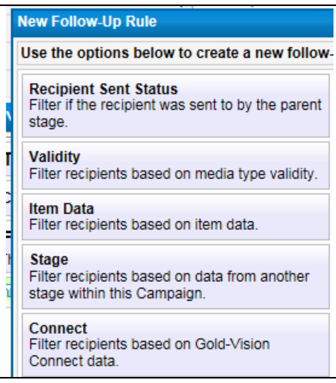
Once the Stage has been run you may wish to create a Follow Up Stage - For Example – to send a Follow Up Email to everyone who has clicked on a specific link in a Gold-Vision Connect Mailshot.

Define your Follow Up Stage, you will the be prompted to add a Rule

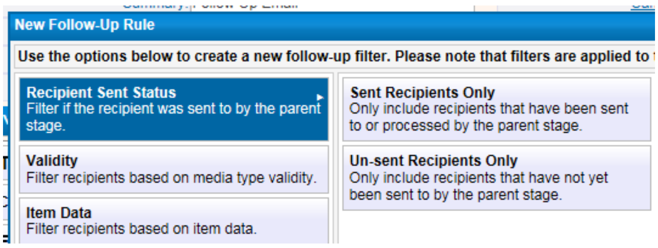


Follow Up Rules

Select from the list of follow up rules



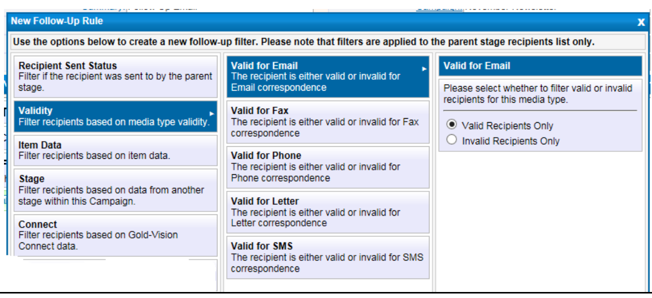
Recipient Sent Status



For example – you have a source 'New Prospects', when the account type changes to Prospect, new accounts will be added. You have used this source to send an email at the beginning of the month. You now wish to send a follow up email but only to those who were included in the original email.

Option – Sent recipients only

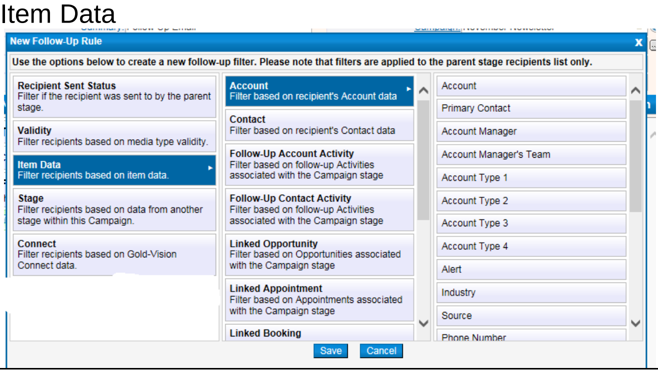
Validity

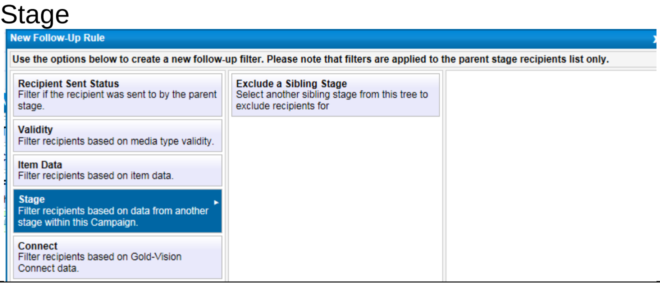


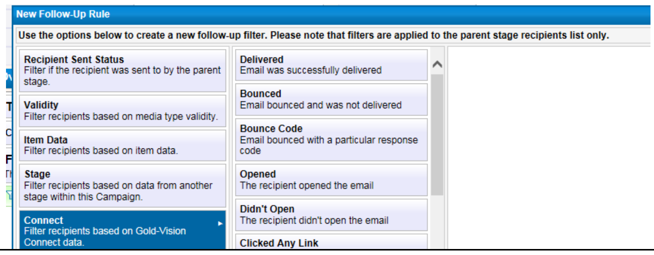
Options to send to either those who were included in the first stage or those who weren't

For exampleStage 1 – email to all Customers but you have some who are Invalid due to missing email address

Stage 2 – send a letter to all those who were invalid in the initial stage

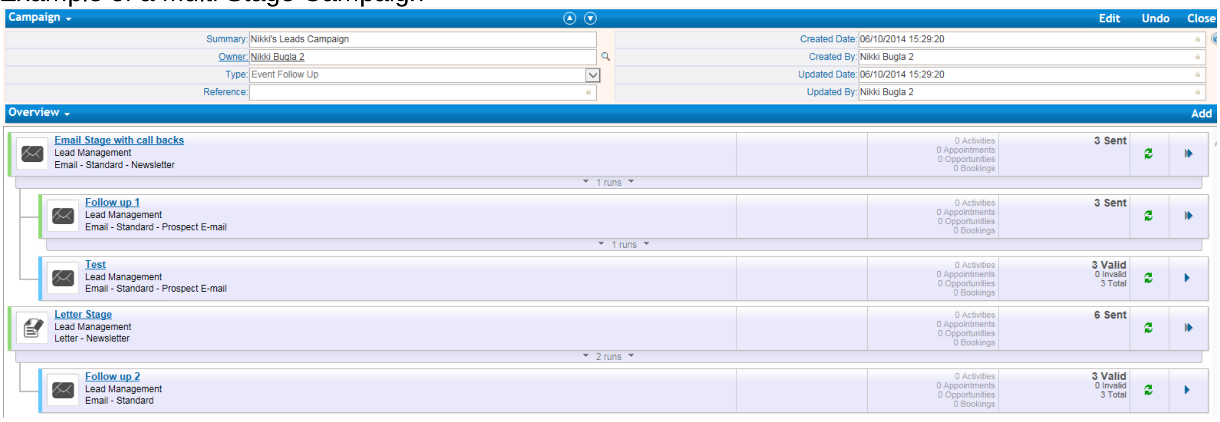
<table>
<tr>
<td>Item Data


</td>
<td>For example I want to send a follow up email with 20% offer, but I don't want to include anyone with an open Opportunity</td>
</tr>
<tr>
<td>Stage


</td>
<td>For example
1st stage is a Connect mail
Follow up 1 is Phone call to those who have clicked a link
Follow up 2 is to re send the mail to those who haven't received a phone call. Use the Exclude Sibling Stage</td>
</tr>
<tr>
<td>Connect


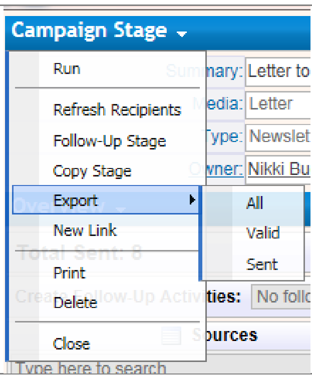
</td>
<td>For example I want to create an activity for a sales person to call if a specific link has been clicked</td>
</tr>
</table>

Example of a Multi Stage Campaign



Managing Campaign Stages

Campaign Stage Menu



Follow-Up Stage:
- Create a Follow Up Stage (see above for more information)

Copy Stage
- Copy the stage and recipients to the Campaign

Export to Excel – All/Valid/Sent
This will send the output to a "Comma Separated Value" format, ideal for Word mail merge, or for sending to an agency.

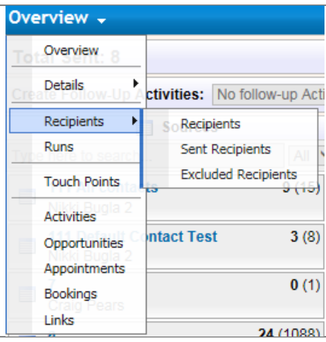
New Link
Create a Link to another Gold-Vision item.

Once the Campaign Stage has been Run, the following will take place.

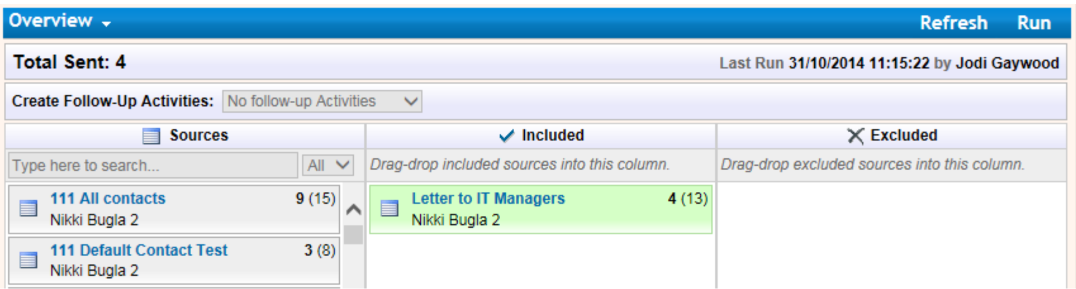
A record of the Campaign will be created for each Account which can be viewed from the Account Overview Screen

A record of the Campaign will also be created for each Contact included in the Campaign which can be viewed from the Contact Record

Campaign Stage – Overview menu

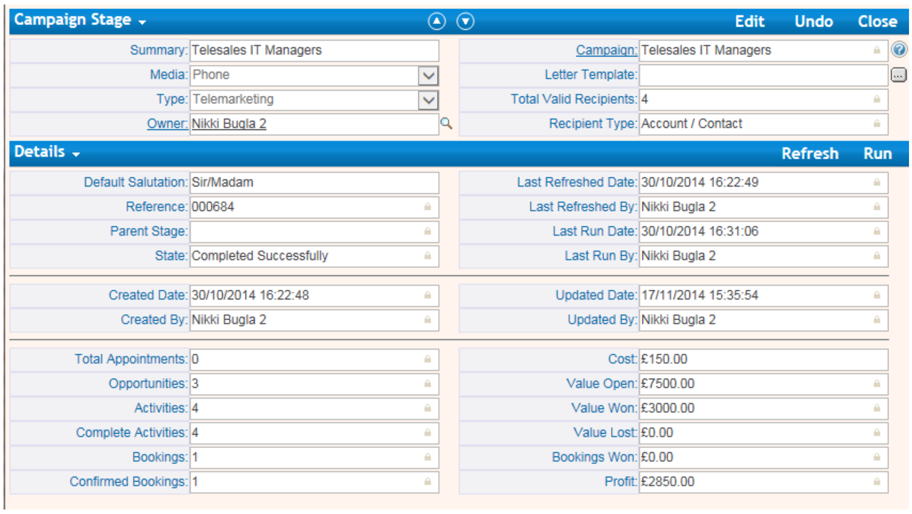


Overview



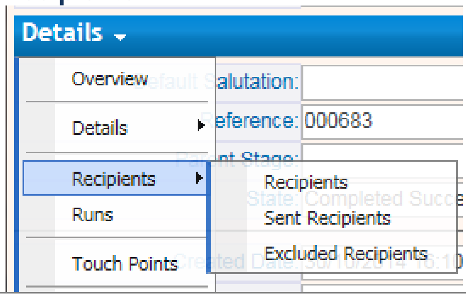
View the Sent, Run and Source information for the Stage

Details



Summary details of the Campaign Stage

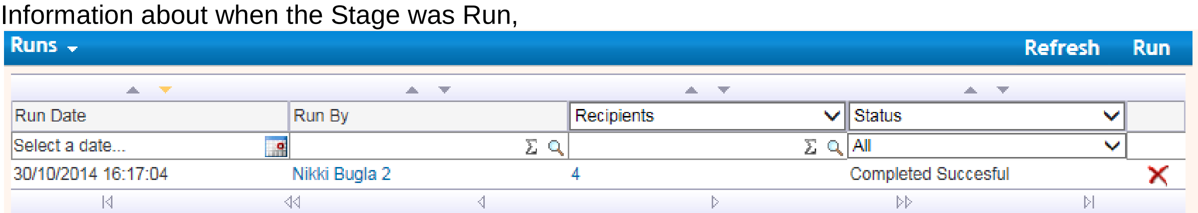
Recipients



Recipients – all recipients included in the Source(s) for the Stage
Sent Recipients – only those recipients who were valid for the stage when it was run. Note there is an option to add these recipients to a Source
Excluded Recipients – all recipients who were Excluded from the Source(s) for this Stage

Runs

Information about when the Stage was Run,



Activities, Opportunities, Appointments, Bookings

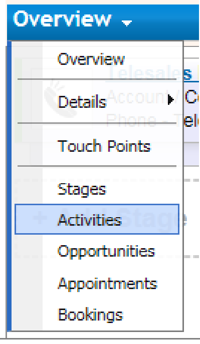
See Managing Campaign Activities.

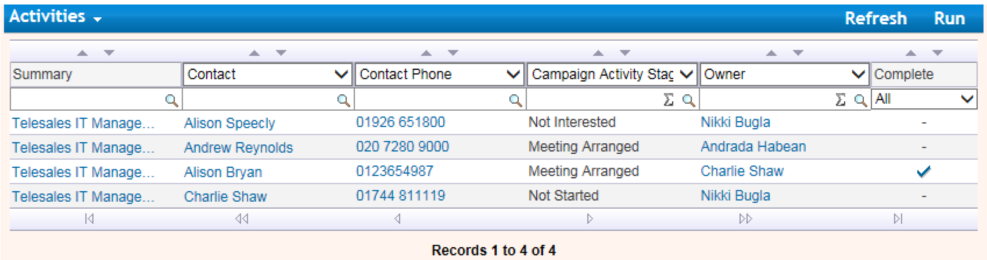
Campaign Activities & Monitoring Campaign Performance

➢ Monitoring the Campaign

It is easy to see the progress of Campaign Activities either from within the Campaign itself, the Campaign Stage, or from the main Activity list.

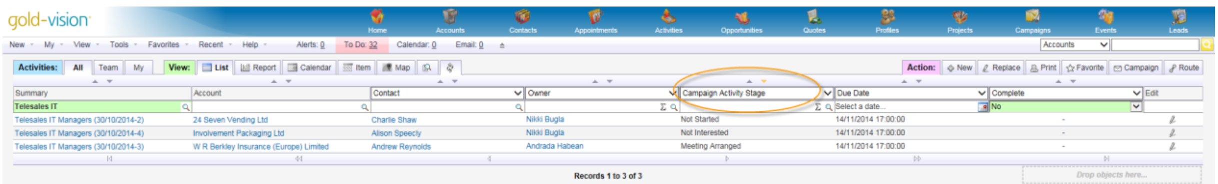
Clicking on an item will display detailed notes, and the user may click through to the Account for any e-mail or Opportunity records created.





By selecting an Activity the record will open and can be Edited, for example, the Status, Activity Stage, and Priority. The Activity can also be opened from the Owner's To Do List

From the main Gold-Vision page you can view all the Activities for a Campaign. Select **Activities,** enter the Campaign in the Summary and select **Campaign Activity Stage.**

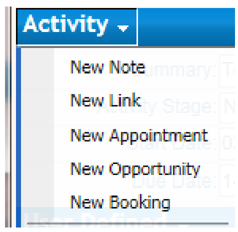


➢ Adding Appointments, Opportunities and Bookings

Appointments, Opportunities and Bookings may be created directly from the Campaign Activity and will be automatically included in the Campaign analysis.
From the Campaign record, select Activities.

Select the Activity you wish to add the Appointment, Opportunity or Booking to.

From the Activity menu select **New Opportunity/Appointment/Booking**

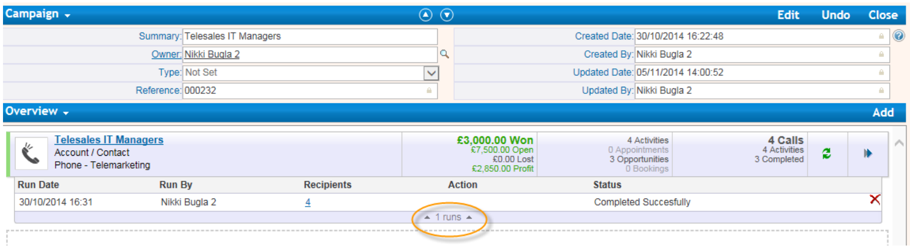


If an opportunity is created independently it can be linked back to the campaign by amending the Campaign Source field. Please see your administrator if this field is not available on your Gold-Vision screen.

From the Opportunity record select **Source Campaign** and select the relevant Campaign (please see you Gold-Vision Administrator if this is not on your Opportunities record)

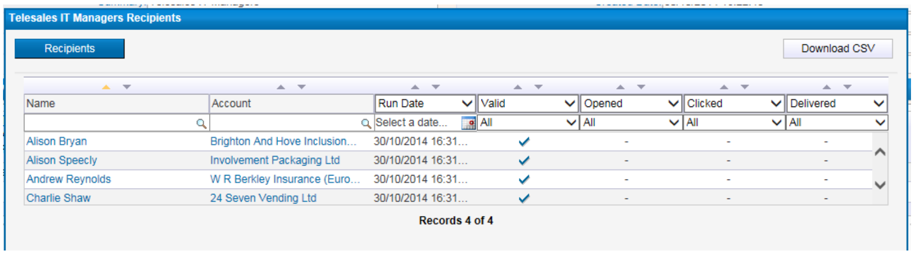
Viewing the Campaign Run History:

From the **Campaign** Overview, select **Runs**



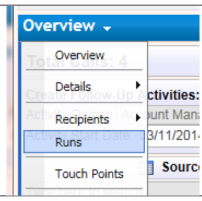
(You can **Delete** a run record by clicking the X. This will remove the run record from the campaign and from each Contact. **Note: If you have created Activities from this run, these will also be deleted.**

Click Run to view **Recipients** included in the Run:



Note- this list can be downloaded to CSV

The information is also available from the Campaign Stage Overview Menu



➢ Re Running a Campaign Stage

A Gold-Vision campaign stage may be re-run multiple times.

This allows you to just use one campaign for, say, the distribution of a standard Newsletter, or for different phases of the same campaign.

Each Run creates a separate record against the Contact and Account. Since the Campaign may retain the same title (although it may be edited), each Run is differentiated with a date stamp. Clicking on each Run record (as seen in the screenshot above) will show the Contacts that were selected for each Run).

Furthermore, each Run can use a different medium, and perhaps a slightly different recipient list.

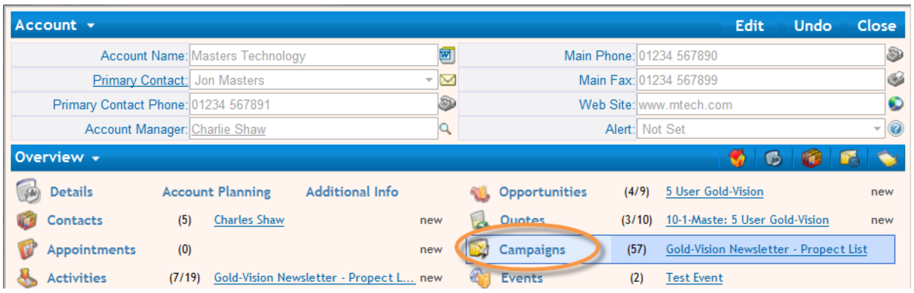
For each run, the user has the choice of:

1. Using the same recipient list - simply re-run without Refreshing the Recipient List. This will ignore any contacts that may subsequently match the original criteria (e.g. have a newsletter profile).
2. Refresh the Recipient List from the Campaign Function menu or from the Source menu. This will re-run the original query and will include any contacts that may subsequently match the original criteria (e.g. have a newsletter profile). See section on Reviewing and Refreshing
3. Make further manual additions or deletions to the list, perhaps removing uninterested contacts.

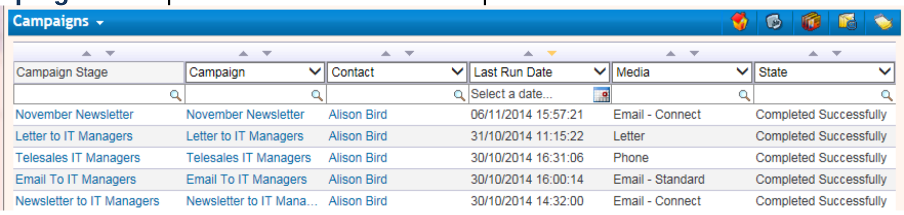
➢ Viewing Campaign Records for an Account

From an Account Overview

Click on Campaigns from the Account Overview screen



A List of **Campaigns** set up for the **Account** will be opened:



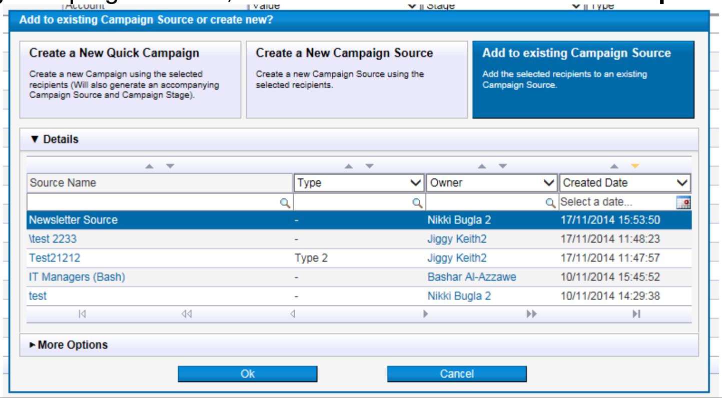
Click on the **Campaign or the Campaign Stage**

More Options

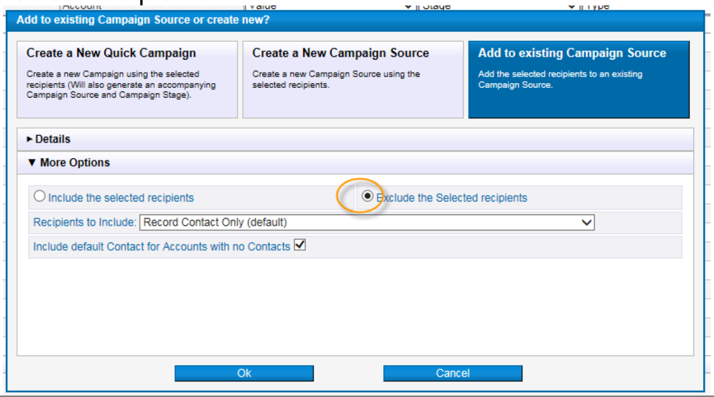
➢ Permanently Excluding Recipients From a Campaign Source

Lists of Contacts can be added to an Excluded from Campaign Sources. For example you might have a Source of all your Customers who you regularly send an Update Email to but you don't want to include a particular group of Contacts

Filter your list to show the Contacts you want to Exclude, click the Campaign Tab.
Select Add to existing Campaign Source, select the Source and click **More Options**

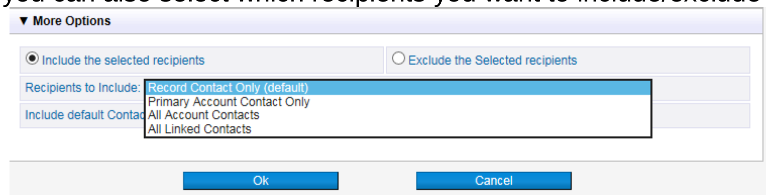


Select Exclude the Selected Recipients



➢ Recipient Options

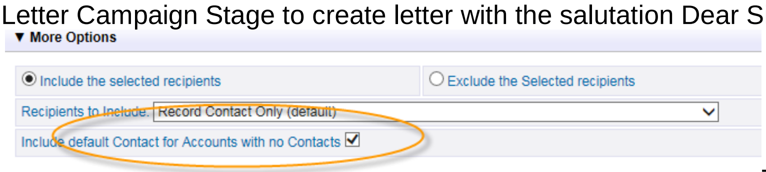
From More Option you can also select which recipients you want to include/exclude in the Source



Record Contact Only – the contact from your list e.g. From a list of Opportunities the contact would be the Contact for the Opportunity. From a list of Accounts this would be the Primary Contact
Primary Contact only – Regardless of the list, this will only include the Primary Contact
All Account Contacts-
All Linked Contact – all Contacts linked to the item. For example – if the list is from Opportunities this option will include all Contacts linked to the Opportunities

➢ Default Contacts

By default, a default Contact for Accounts with no Contacts will be included. This gives the option in Letter Campaign Stage to create letter with the salutation Dear Sire/Madam.



This can be unticked if required.