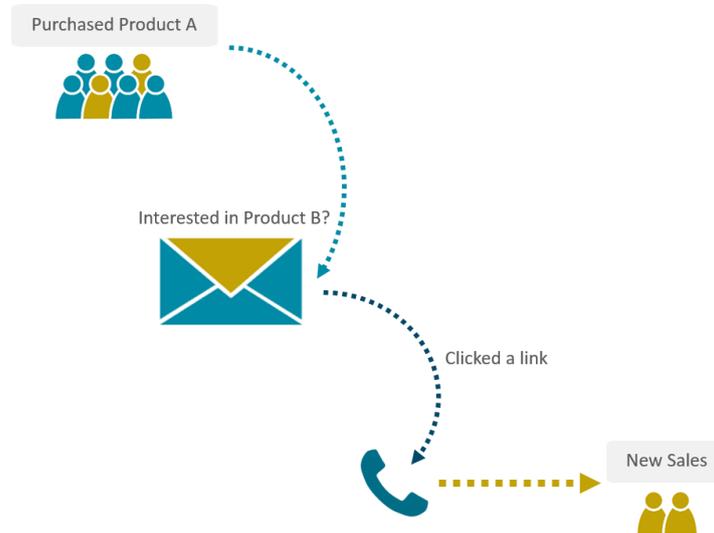


## Up-sell Campaign



Marketing Automation is a great tool for additional sales! If you sell a range of products, you could send automated emails to customers suggesting additional complimentary products they may want to buy. Bought a dining room table? Maybe you'd like some chairs with that! Bought a printer? Maybe you need some ink? Purchased tickets to an event, maybe you'd also be interested in this other event? For this example, we're simply calling them Product A and Product B.

This series sends an automated email promoting Product B whenever a customer purchases Product A. If a customer clicks on the email link to learn more about Product B, the series automatically creates a follow up phone call for the customer's account manager, to get on the phone and sell Product B! The series can also work in the opposite direction: if a customer purchases Product B, they'll receive the email about Product A, and the telephone call if they click on the link.

### How to set up the Up-sell Campaign:

Requirements: Marketing Automation, Campaigns, Gold-Vision Connect

#### Step 1

Create and **start** your automated email template in Connect.

#### Step 2

Create two Campaign Sources in Product Sales. The first should be a filtered list of all customers who purchased Product A, the second would be a list of all customers who purchased Product B. Create a new Campaign and add a new Email – Connect Stage. Drag your Campaign Source of Product A sales into the included column. To avoid upselling Product B to customers who have already purchased it, drag your Product B Campaign Source into the excluded column. We've also excluded any customers with open opportunities, which may or may not be applicable depending on your business processes.

Create Follow-Up Activities: No follow-up Activities		
Sources	Included	Excluded
Type here to search... All	Drag-drop included sources into this column.	Drag-drop excluded sources into this
<ul style="list-style-type: none"> <li>14/4 Open Opps (17) - Nikki Bugla</li> <li>21/7 Prospects (63) - Nikki Bugla</li> </ul>	<ul style="list-style-type: none"> <li>Purchased Product A (2) - Lien Schoutteten</li> </ul>	<ul style="list-style-type: none"> <li>Purchased Product B (2) - Lien Schoutteten</li> <li>Open Opportunities (13) - Lien Schoutteten</li> </ul>

Now run the Stage 'Repeatedly or On a Schedule', choosing your automated template and setting it to run **Weekly to new recipients only**. Now, every time somebody purchases Product A, they will automatically receive an email promoting Product B, unless they have already purchased Product B or have an open opportunity.

You may sell the type of product where this is sufficient. A customer can click on the link to Product B and purchase. Job done. However, if you sell something with a longer sales cycle – this click may only be the first step to purchasing. You may want to nurture this action, and get your sales team involved.

### Step 3

Set up a **Follow Up Phone Stage**. This Campaign Stage will create a phone follow up activity for the Account Manager of any customer who clicks on the link to learn more about Product B. Add a **rule; Connect – Clicked Any Link**. If you prefer to be more specific, you can choose 'Clicked a Specific Link' and the url of the link that directs your customer to Product B. Set the follow up activity settings:

Create Follow-Up Activities: Create Contact Activities

Activity Owner: Account Manager Activity Stage: Not Set

Activity Start Date: Activity Due Date:

Run your Phone Stage 'Repeatedly or On a Schedule', setting it to run **Daily**. Now your Account Manager will automatically receive a Follow Up Activity every time one of their customers clicks on the link to learn more about Product B.

You can set up this process as many time as you like. We've set it up twice – once promoting Product B to customers who purchased Product A, and vice versa.

Interested in product B as well? Account / Contact Email - Connect - Product Promotions and I...	Runs Weekly on Wednesday at 16:00 From 30/12/2015 to 31/12/2016 To New Recipients Only Using template: Product 1	0 Activities 0 Appointments 0 Opportunities 0 Bookings	2 Sent 2 Delivered 2 Opened 2 Clicked
Account Call - Shown interest in pro... Account / Contact Phone - Account Management	Runs Daily at 05:00 From 30/12/2015 to 31/12/2016 To New Recipients Only	£7,500.00 Won £0.00 Open £0.00 Lost £7,500.00 Profit	2 Activities 0 Appointments 1 Opportunities 0 Bookings
Interested in product A as well? Account / Contact Email - Connect - Product Promotions and I...	Runs Weekly on Thursday at 14:30 From 30/12/2015 to 31/12/2016 To New Recipients Only Using template: Product 2	0 Activities 0 Appointments 0 Opportunities 0 Bookings	2 Sent 2 Delivered 2 Opened 2 Clicked
Account Call - Shown interest in pro... Account / Contact Phone - Account Management	Runs Daily at 05:00 From 30/12/2015 to 31/12/2016 To New Recipients Only	2 Activities 0 Appointments 0 Opportunities 0 Bookings	2 Calls 2 Activities 0 Completed