ONCONTACT MARKETING
AND CAMPAIGN USER GUIDE

V10
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Marketing Dashboard

The Marketing dashboard is designed for representatives to manage their campaigns and opportunities.

A marketing campaign is a coordinated series of activities that can include promotion of a product through different mediums (television, radio, print, online) using a variety of different types of advertisements, communication, demonstrations, tradeshows or other interactive techniques.

Marketing campaigns can be designed with different goals in mind, including building a brand image, introducing a new product, increasing sales of a product already on the market, or even reducing the impact of negative news.

An example of the Marketing Dashboard is shown below:

Note: By default, the data for ALL Campaigns are displayed/totaled in the panels. You can use the Filter option in any panel to select one or more individual Campaigns rather than all of them.

You can select from MANY different panels and badges to customize your own Marketing Dashboard.

Marketing Dashboard Badges

- New Leads Today:
OnContact Marketing Guide

- New Leads This Month
- Active Leads
- Website Visitors Today

Marketing Dashboard Panels

- **Marketing Expenses:** The total expenses associated to all campaigns, organized by Expense Type.

- **Opportunity Status:** Displays the total count of all campaign-related opportunities organized by status.

- **Campaign Cost:** Summary of costs logged for all campaigns.

- **Campaign Opportunity Status Amount:** Total amount of campaign-related opportunities grouped by Opportunity status.

- **Emails:** Tracks the emails that have been sent, and whether they were opened.

Campaign Record

**How to add a new Campaign**

A campaign is a series of actions whose purpose is to market a new or existing product or service to a targeted group.
Field Descriptions

- **Description**: The user-defined name for the campaign.
- **Start Date**: The intended start date of the campaign.
- **Manager**: The user who is managing and executing this campaign.
- **End Date**: The intended end date of the campaign.
- **Status**: The current status of the campaign.
- **Stage**: The current position of the campaign in its defined series of steps or phases. Stages are user-defined and campaign-specific.
- **Target Number**: This is the number of customers or prospects targeted in this campaign.
- **Type**: Classify the type of the campaign, whether it's a Mailing, E-Mailing, Telemarketing, etc.
- **Estimate Revenue**: Revenue estimated to be generated from this campaign when it completes.
- **Source**: Companies, Contacts and Opportunities are related to a campaign via source codes.
- **Budget Cost**: Amount estimated for funding a successful operation for the campaign.
- **Active**: Signifies if the campaign is still active or has been completed and made inactivate.

**Opportunities Tab**

List all opportunities associated to the campaign. You can either add a new Opportunity from this screen, or from and existing Opportunity, you can use the Source field to link that Opportunity to a Campaign.

**Attachments Tab**

Link any file you like to the Campaign for reference. You can also email any attachment directly from this tab if needed.

**Targets Tab**

This tab lists all the Companies or Contacts that you have targeted for the Campaign.
Assigning Targets
There are several ways to add Targets:

- From the Marketing icon, use the Targets tab, click the Plus icon and search for the Company or Contact you want to add.

- You can search for a set of Companies or Contacts using the Company or Contact Search. Either way, once you have a set of search results displayed in your search list page, click to Select All. Then click the Workflow button and choose Assign Campaign.

After importing Contacts or Companies, you can open a list page to display the newly imported records, then click to Select All (lower-right corner). Then click the Workflow button and choose Assign Campaign.

Workflow Button
The workflow button provides quick access to some common CRM functions. Select one or more targets and Assign an Activity, Assign them to another User, etc.

Suspect Lead Records and Lead Processing

A Lead record is created in a variety of ways:

- Manually add
- Import from a file (Excel or CSV) using the Lead Import template
- Automatically via a Website form created in OnContact
  - When a visitor on your site submits information, such as Name, email address, and phone number, through a web form generated in OnContact and inserted into your website, a Lead is created including the captured information. All prior visit information is related to this new lead so you can view what web pages were visited and how often.
New List and Edit pages were created to manage and qualify leads. These pages are found in the Marketing module.

The Lead Edit page displays details as name, status, and source. A history of web visits and events are also available in the tabbed section at the bottom of the page.

Leads are approved, or qualified, by promoting them to contacts or companies. You may create a Contact and/or Company from information gathered for a lead, or link existing records to the lead.

From the Contact and Company profile tabs, you can view related leads, or navigate to the lead data.

Lead Scoring and Event Types
Lead scoring is the automation of the lead qualification process and helps ensure that quality leads receive the proper attention. This is accomplished by establishing a rating system for events that occur during the sales cycle. The OnContact application increases or decreases a records “score” each time particular events occur. Scoring may be triggered by various types of events including the creation of activities, email clicks, website visits, field updates, and so on.

OnContact tracks lead score for four entities; Visitors, Leads, Contacts, and Companies. The range for a lead score is configurable, by default it has a minimum value of 0 and maximum of 100. In other words, it cannot increase beyond 100 or decrease below 0. When a visitor becomes a lead, or a company and/or contact is created from a lead, the new item inherits a lead score. Similarly, when score is changed for a lead, the related contact and/or company score will change as well.

Scoring is based on configurable events on the Event Types Setup screen in the OnContact application. Each event may increase, decrease, or set the score to a specific value. For example, when a contact is created from a lead record, the lead score is increased by a value of 10. When a contact clicks on the Unsubscribe Link in an email, their lead score may be set to 0. OnContact provides the following example events out-of-the-box.
• When a company is created from a lead, increase score by 10
• When a contact is created from a lead, increase score by 10
• When an opportunity is created for a contact or company, increase score by 20
• When opportunity status is set to lost, set score to 0
• When a web form is submitted, increase score by 5
• When information is requested (Activity created), increase score by 5
• When trial is requested (Activity created), increase score by 10
• When the website is visited, increase score by 1
• When the product page is visited, increase score by 3
• When an email is opened, increase score by 1
• When email subscription is opted out, set score to 0
• When demo is scheduled (Activity created), increase score by 10
• When lead email and phone number is populated, increase score by 2
• When lead status changes to Bad Data, set score to 0
• When lead is inactive for x days (no website visits), decrease score by 2

Lead Score is visible on the Contact, Company, and Lead Pages. In addition to the score, you can view the last time it was changed and the maximum score achieved.

Lead Scores are also available to List pages so you may search or sort by these values.

Web Visitor Tracking
The Web Visitor Tracking feature logs how prospects come to your company site, what pages are visited, and how often they are viewed.

Visitor tracking is done by inserting a small chunk of javascript into pages of a website, or simply the root page of the site, which gathers visitor browser information that is sent to OnContact.

The Setup module provides an option to generate and copy this code, tailored to a particular OnContact site, which may be used for hosted or on-premise implementations.
The web service on the backend provides script to a page which executes each time it loads. All required components for the script are loaded in a manner to avoid cross site scripting calls (via an IFrame).

Visitor and visit information makes use of a cookie. The cookie stores information to identify the visitor and details of the current visit, including the time the last page was loaded. The cookie is periodically updated with data to track the time spent on the page, and also stores information from the browser, such as IP address, calling page, and browser type.

Information stored in the cookie is sent to OnContact each time a page is loaded to build a history of pages navigated during a visit.

A dashboard and several panels display Visit, Visitor, and Lead data. Panels include graphs that show Visits by Date and Pages Visited.

A List page is also available to view visit details. Here you can see how a visitor came to your page and how long they spent viewing it.

Visitor tracking gives you organization insight into what organizations are visiting your site and what interests them. See what pages are most effective by how often they are visited and the amount of time spent on them.

**Suspect Leads VS. Contact Leads**

There are important difference between suspect Lead records, and Contact records with a Status=Lead.
**Leads**
- Designed for keeping suspect data separate from Workspace in Marketing
- Designed to be worked on individually
- Can be imported, web traffic, or manually entered
- Can be promoted to Contact record
- Not for mass functions, emails or campaigns
- Cannot be linked to Activity records

**Contacts**
- Use Status value = ‘Lead’
- Available in both the Workspace and Marketing
- Can be used in mass functions, emails and campaigns
- Can be linked to Activity records

Always consider HOW you plan to use the data before importing!
Web Forms

The Web Forms feature lets you generate HTML forms that include logic to insert data into the OnContact database. This feature may be used to populate the lead table through forms that are submitted to request product information, register for an event, or sign up for a newsletter.

Web Forms are created in the Setup module by defining basic information about the form and the type of data you wish to gather. Generated with each form are web service calls to populate the OnContact database with values submitted with a form.

Setting up a Web Form

Web Form submission is tied in with visitor tracking. When a form is submitted, an OnContact Lead record is created, including the data entered on the Web Form (i.e. name, email address, and phone number). The visitor history data is included in the new record.
Email Designer

An email designer is included in Marketing. To access it, click Email Marketing ➔ Email Templates.

This designer lets you drag and drop content blocks to quickly create professional looking email templates. Or, you can select the HTML tab if you prefer to work with the code instead.

Tip: DO NOT copy and paste content directly from applications such as Microsoft Word. If you do, these editors apply unwanted borders to your images, etc, that can’t be seen but that will appear when you send out your email! To avoid this, you can copy from Word and paste first into Notepad….then, copy from Notepad and paste into your Email Template.

The Email Designer uses a combination of Email Layouts and Content Blocks to simplify the process:
Email Layouts
When you want to design a new Template, you can save time by selecting an existing Email layout (or create a new one) that has a format similar to the design you want to include in your final Template. We provide several basic layout options to choose from so you do not need to build your templates from scratch.

Once you have selected a layout for your template, you can easily alter the template by adding or replacing images, editing text and styles, and inserting hyperlinks.

You can also add your own new custom layouts and make those available to everyone in your organization.

Content Blocks
Content Blocks (i.e Headers, footers, social media buttons, text/column blocks, etc) make it easy construct consistent email templates. A list of content blocks are displayed on the right side. Drag and drop the block you want to insert into the document design area. Click the Edit button in any block to make your changes.

For instance, apply your own branding in the Header block by adding your logo and company information. The footer contains company contact information and unsubscribe link.
Customize by Merging Data

Your emails can include dynamic content from the OnContact database. For example, you can personalize your communication by including the contact’s name, or merge information about the representative (such as name and phone number) sending the email.

While editing a block, click the Insert button to select from the various fields in the database.

Layout - Design

To customize the colors, backgrounds, borders and images for any block, click the Layout button when you have selected the block for editing.
Tracking Email Opens and Click Thru’s

You can track events such as whether a person clicks a hyperlink in your email or opens it by setting up a workflow in your template.

Here’s how:

1. Select an image to edit, and choose the **Hyperlink Properties** option in the Email Designer.
2. Select the Workflow button.
3. Choose the type of event you want to track. The example below shows a Click thru.
4. Enter the redirect URL for the image (the landing page you’d like to use for the image when clicked).
Email Bounce-back Processing

Email bounce-back processing helps to cleanse the CRM database of invalid email addresses (any failed emails sent through Amazon’s Simple Email Service (SES)).

A CRM task routinely reviews emails that have been returned. Invalid Email addresses are made inactive and updated with a code to indicate why it was invalid. Activities created to track the sending of emails are also closed with a result code that indicates that the email failed to be delivered, along with a related event that includes further details of why it failed. Examples of events for email failures include nonexistent email address and a full mailbox.

By deactivating invalid email address, future emails to these accounts will no longer be processed.
Communication Lists

Communication or Email lists define a group of contacts you wish to email on a regular basis, sending a monthly newsletter for example. Contacts can be added to communication lists through mass assign or campaign workflow actions.

Communication Lists are managed in the Marketing module. In addition to active emails, you can also view emails on the list that were found to be invalid. Statistics regarding the delivery success for each run are displayed here.

Once a list is defined, emails may be scheduled for a communication list. When a run is defined, you select which template you wish to send, from whom, and details about the activity created after the emails are sent.

Communication runs are processed by a task that runs on a regular basis. Emails from runs are placed into the email queue when they are due.
Setting Up Your Company Defaults

It’s important to set up your Company default information here in the Setup>System Setup area:

![Setting Up Your Company Defaults](image)

This data is used by OnContact for Social Media, Email icons for Email Templates etc.

*Once you have completed this data here, there is no need to adjust the links in your email templates. OnContact will automatically use the data shown here.*

Your Company Logo

Save time and make your templates consistent by replacing the `company-logo.jpg` file in the web image library with your own company’s logo.

Do not change the file name- keep it named company-logo.jpg.

When you have done this, ALL templates that use this image will be updated to use your own logo!
Automating your Campaign Using Business Process Steps

**Business Process Step**

Overview

You can define various steps for your Campaign to automate many different functions. For example, you may want to have the system automatically send an email alert to your Sales Rep when a target completes the Contact Us page on your website. Or, you may want to automatically remove a target from your Campaign if they opt out of your email.

You can define a wide variety of scenarios to ensure that your Campaigns run smoothly and efficiently.

*To access this select the STEPS tab from the Campaign record.*

Conditions and Actions

Each step has a condition, which defines when the step will happen via either a time offset value, an event – or both. When the condition and/or time offset has occurred, the Action(s) you define will take place.

This is the set of Conditions and Actions provided for you to choose from:

<table>
<thead>
<tr>
<th>If this Condition is Met….</th>
<th>Process an Action:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clicked Thru</td>
<td>Target clicked thru your email</td>
</tr>
<tr>
<td>Company Created from Lead</td>
<td>An existing Company Lead is converted to a Company record</td>
</tr>
<tr>
<td>Contact Created from Lead</td>
<td>An existing Lead is converted to a Contact record</td>
</tr>
<tr>
<td>Demo Scheduled (activity Created)</td>
<td>Use the Activity called Product Demonstration.</td>
</tr>
<tr>
<td>Email Address Does Not Exist</td>
<td>Received an error for invalid email address</td>
</tr>
<tr>
<td>Event</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Email Opened</td>
<td>The target opens an email sent from OnContact</td>
</tr>
<tr>
<td>Email Sent</td>
<td>This is triggered when an Activity is Created during an email merge.</td>
</tr>
<tr>
<td>Form Submitted</td>
<td>This is triggered when any OnContact web form (see web form section for more info) is submitted on your website.</td>
</tr>
<tr>
<td>Inactivity</td>
<td>Inactivity is measured automatically via system tasks. There is a default value of 3 days.</td>
</tr>
<tr>
<td>Info Request</td>
<td>Use the Activity called Send Product Information.</td>
</tr>
<tr>
<td>Lead Email and Phone is Populated</td>
<td>When these fields are populated on the Lead record.</td>
</tr>
<tr>
<td>Lead Status Changed to Bad Data</td>
<td>When a Lead Status is changed to Bad Data for a contact or company linked to this Campaign.</td>
</tr>
<tr>
<td>Mailbox Full</td>
<td>If a Mailbox full error is received from an email sent by OnContact</td>
</tr>
<tr>
<td>Opportunity Created for Contact or Company</td>
<td>When an Opportunity record is created for a contact or company linked to this Campaign.</td>
</tr>
<tr>
<td>Event Description</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Opportunity Status Set to Lost</td>
<td>When an Opportunity Status is changed to Lost for a contact or company linked to this Campaign.</td>
</tr>
<tr>
<td>Opted Out</td>
<td>When a Target clicks the Unsubscribe link in an email sent from this Campaign.</td>
</tr>
<tr>
<td>Pricing Page Visited</td>
<td>This is triggered when a webpage with OnContact Tracking code is visited.</td>
</tr>
<tr>
<td>Product Page Visited</td>
<td>This is triggered when a webpage with OnContact Tracking code is visited.</td>
</tr>
<tr>
<td>Trial Request</td>
<td>This is triggered when a webpage with OnContact Tracking code is visited.</td>
</tr>
<tr>
<td>Website Visited</td>
<td>This is triggered when a webpage with OnContact Tracking code is visited.</td>
</tr>
</tbody>
</table>

Tip: The Days offset is the number of days since the previous step occurred - so first step is usually set to blank or zero.

Note: In most cases, a Step will only have 1 action defined for it.

Schedule

The system runs a task (process Business Steps) according to the schedule you set. It looks at all the campaigns and steps that are defined, and processes all that are ready.

Tip: Under Options you can Test the Step you have defined.
Example:

Description: When a target submits a Contact Us form on your website, you want to send them a confirmation email, and alert your Sales Rep.

1. Open your Campaign, and click the Steps tab.
2. Click the New icon.
3. Type a description for your step.
4. Click Conditions
5. Enter the Days offset value - since this is the first step, we will use 0.
6. Under the Events drop-down, select the Condition to trigger processing. For this example, we selected ‘From Submitted.’

Business Process Step

<table>
<thead>
<tr>
<th>General</th>
<th>Conditions</th>
<th>Actions</th>
<th>Schedule</th>
</tr>
</thead>
</table>

Wait this many days from the completion of the previous step

Days 0

And

Process this step after the following events occur

Events Form Submitted

7. Click the Actions button.
8. Click to add an item.
9. Choose ‘Send Email Merge.’
10. Click the action you selected to open it and set parameters. In this case, it’s an email merge. Here’s the setup screen:
11. Select the options for your email merge.
12. Click OK.
13. Click the Add icon.
15. Click to open the Action and select the parameters for your email alert to the rep.
16. Click to Save your changes.
Best Practices for Marketing
Targeting Your Customers Using Interest, List and Source

The following fields can be used to target your customers for more effective Marketing. Each of these are searchable, and you can assign multiple values for each!

**Interest – Located on Company, Contact, and Opportunity records**

- Used to indicate the set of your products and services they are interested in
- Located on Profile tab
- Setup/Misc/Interest and Interest Subgroup

**List – Located on Company and Contact records**

- Used to categorize groups of records...Ex: Holiday mailing list, or Distributor, Tier 1 Customer
- Located on Profile tab
- Setup/Misc/List and List Subgroup

**Source - Located on Company, Contact, Opportunity records**

- Another way to categorize records, typically for Marketing and can be linked to Campaigns
- Located on Profile tab
- Setup/Campaigns/Source
Because these are searchable fields, you can use the various functionality built into searches to locate these records easily, and perform mass functions on them. For example, find all contacts interested in product ‘X’, assign them to a campaign, and send out an email blast— all in just a few clicks.

**Add the fields to your Search Criteria Options – click Options then Select Columns to add:**

- List
- Interest
- Source

**Once you have run a search, select some or all of the search results. When you do, you can:**

- Export the search results to Excel
- Use Workflow to perform mass functions, such as:
  - Assign Targets
  - Assign Campaign
- Add columns of data to your search results using Options
  - Add Columns
- Filter columns anyway you like to further refine your search results.