

Using Lakeshore to manage your Marketing Campaigns

This newsletter describes some of the features in Lakeshore that you can use for managing marketing campaigns for your prospects. It could also be used for existing customers.

The sample campaign will consist of 5 contacts or “touches”. Each touch could be a letter, brochure, catalog, e-mail, call, or personal visit.

Setting up contact/follow up codes

The first thing you will need to do will be to define your contact and follow up codes.

To set up new contact codes, go to

Reference Information
Miscellaneous codes, group 2
Contact codes

To set up new follow up codes, go to

Reference Information
Miscellaneous codes, group 2
Follow up codes

You will usually want to define these the same way. Each touch in the campaign should be numbered in consecutive order. The sample ones are numbered 51-55.

If you are already using contact and follow up codes, you may want to jump higher in the sequence to define your new codes. The size of both codes has been expanded from 2 digits to 3 digits so you should have plenty of room.

It is also suggested that you leave a gap of at least one number between each campaign if you are running multiple types of campaigns. So, for example, campaign 1 might be codes 51-55, campaign 2 would be 57-60, etc.

Designate one prospect type or selection code to define which campaign will be used for each prospect

If you have several different campaigns available, the person entering the prospect will need to indicate which campaign should be used for that particular prospect. The best way to do that is to set up a prospect type or selection code position for this purpose. Then, set up a code for each campaign.

If you only have one marketing campaign defined, you may omit this step. You may want to bypass this step for the first campaign until you see whether this process will work for you.

Enter new prospects as they become available

If you have multiple campaigns, please be sure to code which campaign should be used for your new prospect.

Once you have the codes and prospects set up, you are ready to start your campaign. There will be 5 steps, one for each touch.

1. Round 1 - Send first marketing piece to all new prospects.
2. Round 2 - Second marketing piece or action
3. Round 3 - Third touch
4. Round 4 - Fourth touch
5. Round 5 - Fifth touch

Instructions for doing Rounds 1 and 2 are described below. Rounds 3-5 are done basically the same way as Round 2.

Round 1 - New Prospects

During this round, you will pull a list of your new prospects and contact them with the first “touch” of your campaign. That “touch” can be a letter, catalog, e-mail, etc.

Step 1 - Pulling initial mailing list for new prospects

In the screen below a mailing list of all prospects entered in the month of November is requested. You can do the process weekly or on some other time period simply by changing the range of dates.

To create the mailing list of new prospects, go to

Marketing Letters & Labels
Create mailing list

For simplicity, this example will only show one marketing campaign.

If you have multiple marketing campaigns, you can define on the prospect file which campaign should be used for that particular prospect. Then you need to pull a separate list of prospects for each campaign by adding an additional requirement for that code on the selection screen shown below.

You only need to pull a separate list for each campaign on the first round. After that, data will be pulled from the contact notes file.

If you have set up additional contacts for any of the prospects, then you would want to pick the “Extract a record for each prospect/contact?” option.

Extract Prospect Data V12

Selection level

Do you want to Extract only one record for each prospect?
 Extract a record for each prospect/contact?

Enter up to 10 ways to select the data.
Leave begin value blank to start at the lowest value.
Leave end value blank to go to the largest value.

Selection criteria		
Selection field	Begin with OR Keyword	End with
1101	Date Added To System	11/1/12 11/30/12
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Step 2 - Print letters or labels or just update contact info

Next, you will need to print a letter or some sort of label to send the first mailing piece. In this example, we will print labels. There is also an option to just update the contact information if you aren't printing anything.

We'll assume in the example that you are printing mailing labels.

There are 3 options related to how the contact information is updated.

- ◆ If you just want to print labels and **NOT** update any contact or follow up information, pick the first option.
- ◆ If you have already specified the type of contact and follow up in the touch file, just pick the "prespecified" option.
- ◆ If all the contact and follow up codes are the same for all the labels, you can specify this information when you do the labels by picking the "specify now" option.

The third option, to specify the contact and follow up information as part of the label process is the best option for this list since everyone on the list is starting the campaign at the same place.

You may specify a contact code and/or a follow up code. The description on file for each one will be displayed initially but you can change that description if you wish. This information will be posted to the prospect as the last contact and next follow up information for the prospect.

Print Labels from List MENU ★ ? V12

File name of List:

Format:

Which address? Mailing/Billing Shipping

Record contact/follow up info?
 Do not update contact or followup information
 Yes, prespecified in "touch" file
 Yes, specify now

Record contact? Contact Code: Description:

Update contact notes?

Set up follow up? Type Followup: Description: Date:

Update calendar? Put on these calendars:

If you click on the "Update contact notes?" checkbox, a notation will also be made in the prospect's contact notes. For the follow up, you can also specify that a notation

should be made to up to 3 people's calendar. One of the 3 can be the salesman's calendar. Putting a notation would be helpful if the "touch" will be a call or visit.

When you submit your request, the labels will be generated and displayed for you to print. Your contact and follow up information will also be posted.

If you go to the following area of the menu, you can see where the contact notes have been made.

Contact Management Contact Notes

On the first screen, you can pick the Prospect option and enter one of your prospect's ID.

The screenshot shows a web application window titled "Contact Notes". In the top right corner, there are icons for a menu, a star, and a question mark, along with the text "V12". The main content area has a heading "Enter contact whose notes you want to update or review:" followed by five radio button options: "Customer", "Prospect", "Vendor", "Master Salesman", and "Other". The "Prospect" option is selected. Below it, there are two input fields: "Contact #" with the value "104400" and a search icon, and a text field containing "BOX FACTORY/Judy Box". Below these is another search icon and a text field containing "Judy Box". At the bottom left, there is a "Start date:" label, a date input field with "11/27/11", a calendar icon, and a red link that says "Leave blank to start with oldest notes". At the bottom of the window, there are four blue buttons: "Submit", "Print Plus", "Reset", and "Exit".

The start date is preset to one year ago but you may change it. It's not particularly relevant for the prospect but these notes are also used for customers. Having a start date will keep the list shown on the next page smaller and keep you from having to wade through a lot of old information.

The next screen will show you a list of any contact information you already have on file. Each contact is date stamped and can be reviewed separately.

There is also a "New" icon where you can enter a new note. You can enter additional contact information this way. You can also set up contact notes from the Lakeshore calendar.

Below is a screen shot of what you would see for one of our new prospects with the contact note we've just added along with the "New" icon.

Click on the red date link to see more information and to add additional contact information when appropriate.

Update Contact Notes

Prospect: BOX FACTORY
Judy Box

11/27/12 V12

Date	Description
11/27/12	Prospecting campaign/Touch 1
New	Set up new note

Exit

Update Contact Notes

11/27/12 V12

Prospect: 104400 Name: BOX FACTORY
Date of note: 11/27/12 Contact: Judy Box

Description: Prospecting campaign/Touch 1
Type of contact: Prospecting campaign/Touch 1
Type of follow up: Prospecting campaign/Touch 2
Follow up Date: 12/10/12

Notes: Additional notes can be added here

Save Delete Print Plus Reset Exit

In addition, the date/type of last contact and date/type of next follow up is recorded on the prospect file.

Prospect Contact/Date Information MENU   V12

Prospect ID:	<input type="text" value="104400"/>	<input type="text" value="BOX FACTORY"/>
Address sequence:	<input type="text" value="0"/> <small>Leave blank for primary address</small>	<input type="text" value="Judy Box"/>
Date added:	<input type="text" value="11/27/12"/>	
Date of last Contact:	<input type="text" value="11/27/12"/>	
Contact code:	<input type="text" value="051"/>	<input type="text" value="Prospecting campaign/Touch 1"/>
Next follow up date:	<input type="text" value="12/10/12"/>	
Follow up code:	<input type="text" value="052"/>	<input type="text" value="Prospecting campaign/Touch 2"/>

Round 2 - Second touch

When it is time for the next followup, you will need to pull a new mailing list for prospects that need follow up in the next time period.

The basis of the mailing lists for rounds 2 - 5 will be the Contact Notes file. Our selection criteria will be the date range for the follow up date. In the example, we've also included a range of follow up codes to ensure we only get contact notes related to our marketing campaign.

Selection criteria		
Selection field	Begin with OR Keyword	End with
1916 <input type="checkbox"/> Follow Up Date	12/1/12	12/15/12
1915 <input type="checkbox"/> Follow Up Code	051	055
<input type="checkbox"/>		

Since you will have prospects at various stages of the marketing campaign, it is useful to preset the values to be used when the next bit of contact/follow up information is posted. To do this, go to

Marketing Letters & Labels

Specify contact/follow up info for mailing list

On the first screen, you can specify defaults to be used on the second screen where you can adjust touch information for each prospect.

In addition, there is a check box related to how the contact code is defined. If checked the **follow up** code on the last touch becomes the default **contact** code for the new touch. The other defaults set on this screen would only be used when there was no follow up code set on the last touch. The only part of the default data used if you already have contact and follow up codes set is the follow up date. Always be sure to set that date.

On the second screen, you will see a list of all the prospects selected. An initial value will usually be set for the contact and follow up information. You may note any

changes you wish to make.

Specify Contact/Follow up info for Mailing List

MENU V12

Delete?	Type ID	ID	Type Info	Code	Description	Follow up Date
<input type="checkbox"/>	Prospect	BOX FACTORY Salesman: Kaye Keady	Contact	052	Prospecting campaign/Touch 2	
			Follow up	053	Prospecting campaign/Touch 3	12/20/12
			Calendar IDs	Kaye Keady	-- No calendar entry --	-- No calendar entry --
<input type="checkbox"/>	Prospect	Keady International Salesman: ROBERT M. KLENKE	Contact	052	Prospecting campaign/Touch 2	
			Follow up	053	Prospecting campaign/Touch 3	12/20/12
			Calendar IDs	Gary French	-- No calendar entry --	-- No calendar entry --
<input type="checkbox"/>	Prospect	Dancing Rabbit Salesman: Kaye Keady	Contact	053	Prospecting campaign/Touch 3	
			Follow up	054	Prospecting Campaign/Touch 4	12/10/12
			Calendar IDs	-- No calendar entry --	-- No calendar entry --	-- No calendar entry --

When you request the labels, pick the "prespecified" option

Print Labels from List

MENU V12

File name of List:

Format:

Which address? Mailing/Billing Shipping

Record contact/follow up info?
 Do not update contact or followup information
 Yes, prespecified in "touch" file
 Yes, specify now

Here is what a calendar entry will look like:

Lakeshore calendar MENU V12

December, 2012						
S	M	Tu	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

January, 2013						
S	M	Tu	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

February, 2013						
S	M	Tu	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28		

← Previous
Exit
Next →

Show completed entries				Add new entry						
Delete?	Comp?	Time	Company/Contact	Overview	Contact Notes	Description	Order/Quote	Add'l info	Schedule follow up	Reschedule entry
<input type="checkbox"/>	<input type="checkbox"/>		BOX FACTORY Contact: BOX FACTORY Telephone: (225)555-1234 E-mail: jbox@theboxfactory.com			Prospecting campaign/Touch 3				

If you are doing a call or other direct follow up, you can click on the "New" icon to manually add a notation with the results of the call.

The remaining rounds would be done like round 2. When you finish the last touch and there is no "next follow up", then the follow up will be blank. At that point, you can set up a specific follow up like a call or e-mail. Or, you can click on the "delete?" checkbox to remove the prospect from further follow ups.

The marketing campaign here is obviously very simplistic. If you have a specific marketing strategy and have questions about how to set it up, please feel free to call Lakeshore to discuss how we can implement it.