CHAPTER 5: CAMPAIGNS AND SEGMENTATION

This chapter contains the following sections:

- Introduction to Campaigns and Segments
- Setting Up Campaigns
- Creating Campaigns
- Creating Segments
- Creating Interactions for Segments
- Creating Segments by Reusing Logged Segments
- Creating Segments by Reusing Saved Segments
- Campaign Pricing
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Introduction to Campaigns and Segments

In the Sales & Marketing application area, you can create campaigns and set up segments of your contacts for mailings and other types of interactions. You can use these features to create and keep track of mass mailings and other interactions in connection with your sales and marketing activities.

Campaigns

A campaign can be any sort of activity that involves a number of contacts. It could be anything from sending out catalogs and special offers to organizing a special event (in which case the contacts might be both vendors and customers). You can record contact responses to campaigns as interactions.

There is a statistics window for each campaign that provides information about the costs and success rates of the campaign.

Segments

Segments are groups of contacts that you create using filters. You can create segments for use with campaigns or for other purposes. You use segments to create interactions, such as mailings, and to view statistics about your sales and marketing activities for that segment of your contacts.

If the interaction is a fax or an e-mail, you can have the program automatically send these to the contacts in the segment. If the interaction is a letter, you can have the program print the letters and mailing labels for the letters. Whichever type of interaction you choose, it is registered as an interaction for the contact.

Once you have created a segment, you can reuse the actual group of contacts or you can reuse the segment criteria to create a new segment based on the same criteria.

Setting Up Campaigns

Before you can use your campaigns, you must set up campaign status codes. You can use these codes to manage your campaigns by assigning a status to the campaign. As you work through the stages of the campaign, you and other users of the program can quickly see which step a campaign is at and which step is coming next.

Setting Up Campaign Status Codes

To set up campaign status codes, follow this procedure:

1. Click SALES & MARKETING→MARKETING→SETUP→CAMPAIGN→ CAMPAIGN STATUS. The Campaign Status window appears:
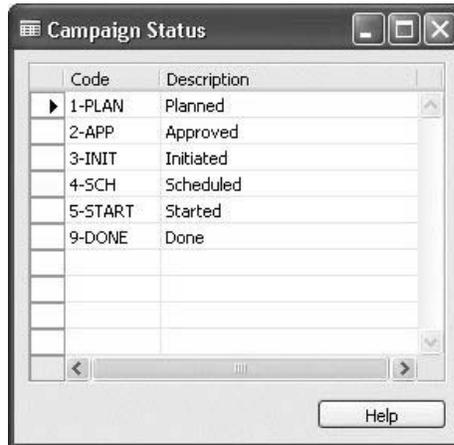
2. Click F3 to add a new line.

3. In the **Code** field, enter a code for the campaign status.

4. In the **Description** field, enter a description of the campaign status.

5. Repeat the procedure for each campaign status you want to set up.

Creating Campaigns

You can view general information about your campaigns on the campaign card. You create a campaign card for each campaign that you want to keep track of.

Creating Campaigns

To record a new campaign in the program, follow this procedure:

1. Click SALES & MARKETING→MARKETING→CAMPAIGNS. The campaign card appears:
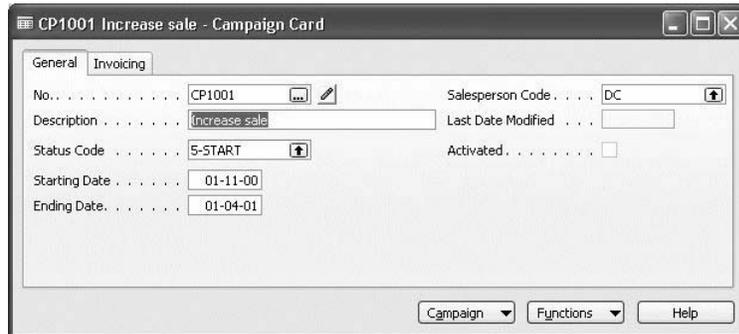
2. Press F3 to create a new campaign.

3. In the **No.** field, press ENTER. The program automatically enters the next available number in the number series for campaigns.

4. In the **Description** field, enter a description of the campaign.

5. Click the **AssistButton** to the right of the **Status Code** field. The Campaign Status window appears.
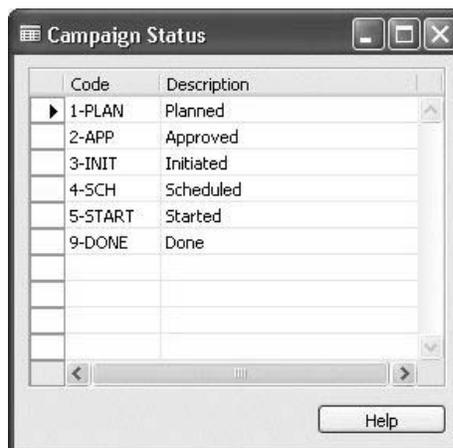
6. Select the appropriate status code, and click **OK**.

7. In the **Stating Date** field, enter today's date.

8. In the **Salesperson Code** field, enter the responsible salesperson.

Creating Interactions Linked to Campaigns

After you have created a campaign, you can record interactions for that campaign. You can create interactions involving a contact and that are linked to the campaign using the Create Interaction wizard. For information on using this wizard, see "Using the Create Interaction Wizard."

Entering Campaign Information in the Create Interaction Wizard

You can enter information about the campaign that an interaction is linked to on the last page of the wizard. You can select which campaign the interaction is linked to, specify if the contact is a target contact for the campaign, and specify if the interaction records the response to the selected campaign.

To enter information about the campaign, follow this procedure:

1. On the contact card, click **Create Interact**. The Create Interaction wizard appears.

2. Fill in the mandatory and any relevant optional fields of the wizard. On the last page of the wizard, click the **AssistButton** to the right of the **Campaign No.** field.

3. Select the campaign that the interaction is linked to and click **OK**.
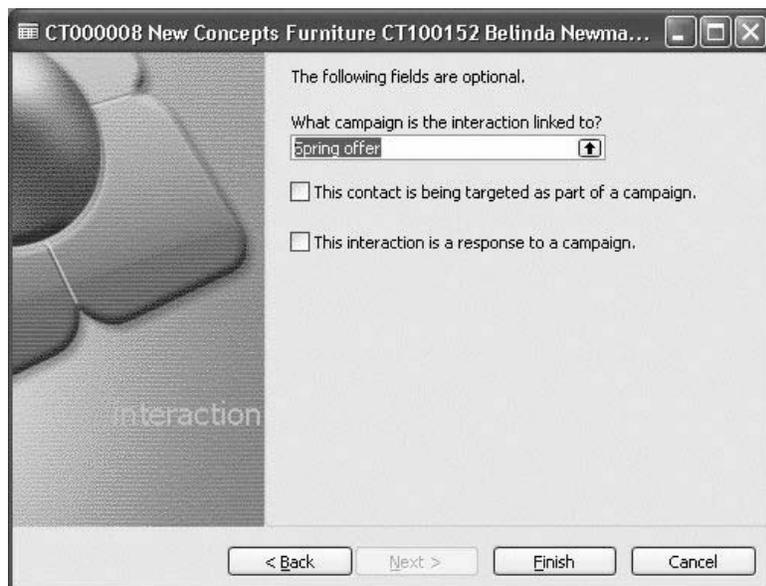
If the contact is part of the target group for the campaign, place a check mark in the **Campaign Target** field.

4. If the interaction is a response to the campaign, place a check mark in the **Campaign Response** field.

5. Click **Finish**.

When you click **Finish**, the program automatically updates the Interaction Log Entries window for the contact and enters a new entry in the Campaign Entries window for the relevant campaign.

### *Viewing the Interaction in the Campaign Entries Window*

You can see this interaction in the Campaign Entries window for the relevant campaign.

To open the Campaign Entries window, click SALES & MARKETING→ MARKETING→CAMPAIGNS. Find the campaign card for the campaign and click CAMPAIGN→ENTRIES. The Campaign Entries window appears.
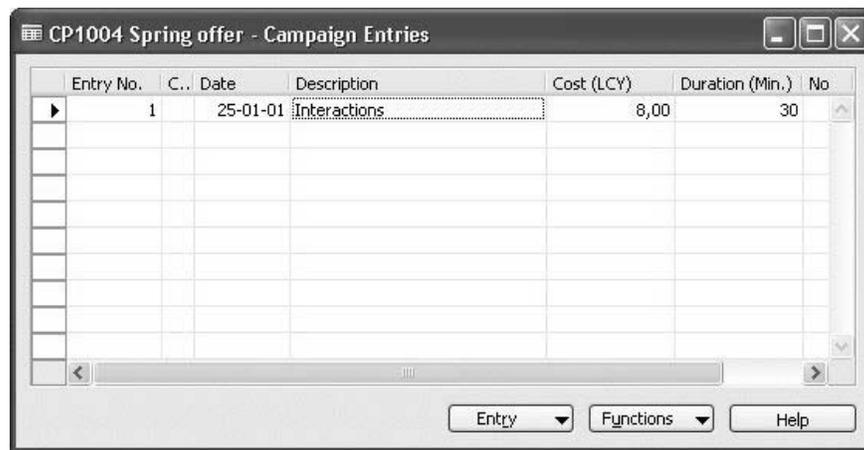
To see the interaction log entry linked to the campaign entry, select the campaign entry, and then click ENTRY→INTERACTION LOG ENTRIES.

The Interaction Log Entries window appears.
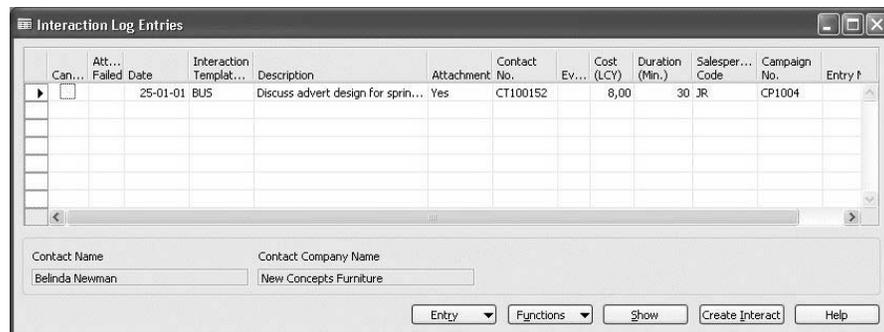
Changing the Status of the Campaign

Once your campaign is under way, you must modify the status of the campaign. You can do this directly on the campaign card.

To modify the status of the campaign, follow this procedure:

1. Click SALES & MARKETING→MARKETING→CAMPAIGNS.

2. On the campaign card, click the **AssistButton** to the right of the **Status Code** field.

3. In the Campaign Status window, select the appropriate option and click **OK**.

Test Your Skills – Creating an Interaction Linked to a Campaign

Scenario: As part of the Increase Sales campaign, you are planning to hold a press conference at the Hotel Continental to present a new product. You have an initial meeting at the hotel that goes well and you book their conference room.

Record this meeting as an interaction linked to the Increase Sales campaign.

When you have created the interaction, the last window of the Create Interaction wizard will look like this:

Creating Segments

You can create segments, for example, if you want to select a group of contacts according to specific criteria, such as the industry the contacts belong to, your business relation with the contact, the interactions you have had with the contact, and so on.

You can, for example, create a segment to select the contacts you want to target with a campaign.

There are two steps in creating a segment in the program: entering general information about the segment and selecting the contacts to be included within the segment.

Entering General Information

Before you can select the contacts within the segment, you must create the segment in the program. To do this, follow this procedure:

1. Click SALES & MARKETING→MARKETING→SEGMENTS. The Segment window appears.
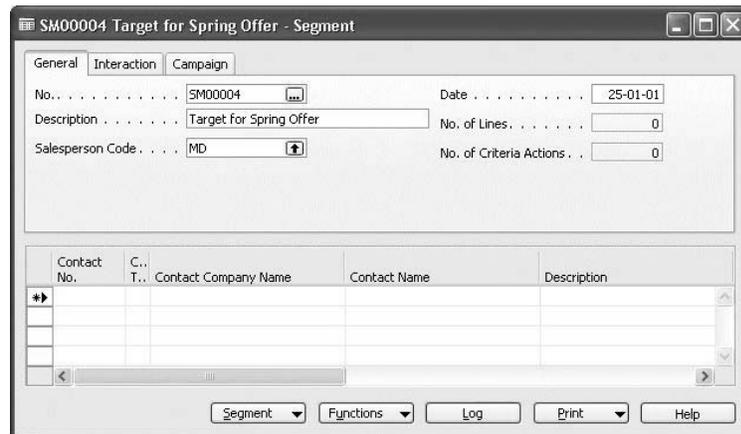
2. Press F3 to create a new segment.

3. In the **No**. field, press ENTER to have the program automatically enter the next available segment number.

4. In the **Description** field, enter a description of the segment.

5. In the **Salesperson Code** field, enter the responsible salesperson.

Selecting Contacts for the Segment

After entering general information about the segment, you must select the contacts to be included in the segment. You can use a variety of criteria to select contacts. For example, you can select contact persons working at a customer site or prospective customer site who are responsible for purchases at their company.

You use filters to add contacts according to, for example, the job responsibility of the contact person or the business relation or industry of the contact company. Once you have added contacts, you can then remove contacts using other filters, such as mailing groups or another filter not used previously.

Example: Adding Contacts to the Segment

To select the contact persons whom, for example, have the business relation Customer and are responsible for purchases, follow this procedure:

1. In the Segment window, click FUNCTIONS→SEGMENT→WIZARD. The Segment Wizard appears.

2. Select the option **Add Contacts,** and click **Next**. The second page of the wizard appears:

3. Click the **AssistButton** to the right of the relevant criteria, in this example the **Business Relation** field, select Customer, and click **OK**.

4. Click the **AssistButton** to the right of the **Job Responsibilities** field. Select the job responsibility Purchase, and click **OK**.

5. Click **Finish**.

   The Segment window now looks like this:

In the **No. of Lines** field, the program has automatically entered the number of contacts selected according to your criteria.

Test Your Skills – Creating a Segment

Scenario: This year at Cronus, you have decided to sponsor the biggest national golf tournament and would like to invite some of your contacts to attend this event.

Create a segment with contacts that are members of the press.

Removing Contacts from the Segment

Once you have added contacts to your segment, you can also remove contacts using other criteria. For example, you could remove all contacts in a specific mailing group or those on a certain organizational level. If you have made a mistake and want to remove an entire group that you added previously, then you can use the same criteria to remove the contacts as when you added them to the segment.

To remove contacts from a segment, follow this procedure:

1. In the Segment window, click FUNCTIONS→SEGMENT→WIZARD.

2. On the first page of the wizard, select the option **Remove Contacts,** and click **Next**.

3. On the second page of the wizard, select **Reduce your segment,** and click **Next**.

4. On the next pages of the wizard, click the **AssistButton** to the right of the criteria you want to use, for example, the **Country** field. Select the relevant country, and click **OK**.

5. Click **Finish**.

After you have reduced your segment by excluding, for example, contacts from GB, your Segment window could look like this:

The Go Back Function

If for some reason you need to reverse the addition or removal of a group of contacts from a segment, you can do this with the Go Back function. The program allows you to undo your segmentation actions.

To add contacts you have just removed, go to the Segment window and click FUNCTIONS→SEGMENT→GO BACK.

The program automatically replaces the contacts that you have removed.

Saving Segmentation Criteria

You can save your segmentation criteria so that you can reuse the segment for other campaigns and interactions.

To save the segmentation criteria that you have defined, follow this procedure:

1. In the Segment window, click FUNCTIONS→SEGMENT→SAVE CRITERIA. The Save Segment Criteria window appears.
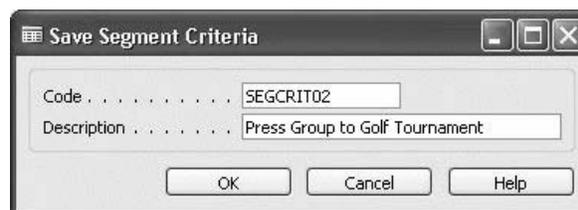
2. In the **Code** field, enter a code for the segment criteria.

3. In the **Description** field, enter a description of the segment criteria.

4. Click **OK**.

Linking Segments to Campaigns

You can link segments to specific campaigns. To do this, follow this procedure:

1. In the Segment window, on the **Campaign** tab, click the **AssistButton** to the right of the **Campaign No.** field. Select the relevant campaign and click **OK**.

2. If the segment is the target of the campaign, click to insert a check mark in the **Campaign Target** field.

Creating Interactions for Segments

You can create interactions for all the contacts within a segment. You can do this directly from the Segment window. In the Segment window, on the **Interaction** tab, you can specify interaction-related information. You can, for example, select an interaction template and an attachment that will be applied to all the contacts within the segment.

Entering Interaction Information for a Segment

To enter information related to an interaction for a segment, follow this procedure:

1. In the Segment window, click the **Interaction** tab.

2. Click the **AssistButton** to the right of the **Interaction Template Code** field. Select the relevant interaction template and click **OK**.

   When you leave the **Interaction Template Code** field, the following message appears:

3. Because you want to send the attachment to all the contacts, click **Yes**.

The program automatically applies the interaction template to all the contacts within the segment.

The program uses the information defined for the interaction template in the Interaction Template window to fill in the different fields on the **Campaign** tab.

The **Interaction** tab looks like this:

Test Your Skills – Sending a Letter to a Segment

Scenario: Send a letter to the segment you created earlier, using the Business Letter interaction template.

Personalizing an Interaction for One Contact

You can personalize an interaction for one contact in a segment, for example, by adding a sentence to a letter.

To do this, follow this procedure:

1. In the Segment window, find the line with the relevant contact.

2. On this line, in the **Attachment** field, click the **AssistButton**.

The program launches Microsoft® Word and opens the letter for the contact.

3. Add the personalized text to the letter.

4. Close the Microsoft Word document.

5. Confirm the subsequent message.
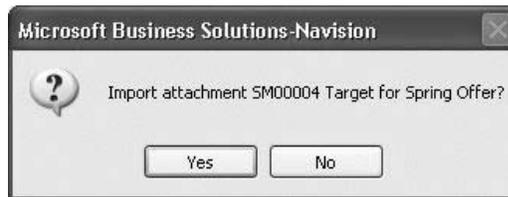
The program automatically enters Unique in the **Attachment** field to show that the attachment is personalized.
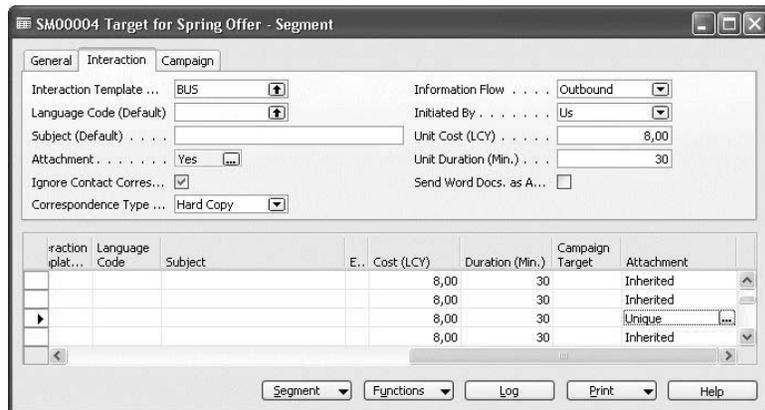
Printing Segment Labels

In order to send letters, you can print labels with the names and addresses of the contacts within the segment. To do this, follow this procedure:

1. In the Segment window, click PRINT→LABELS. The Segment - Labels window appears.
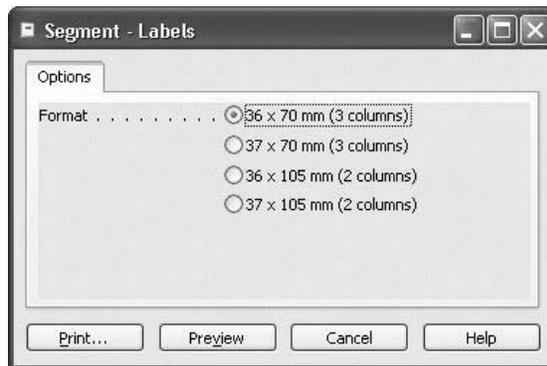
2. The program automatically selects the option **36 x 70 mm (3 columns)**. Select other dimensions if necessary.

3. Click **Print**.

4. In the Segment - Labels - Print window, check the printer settings and click **OK**.

Printing Letters

You can print letters created as interactions and have them recorded in the program. Follow this procedure:

1. In the Segment window, click **Log**. The Log Segment window appears.
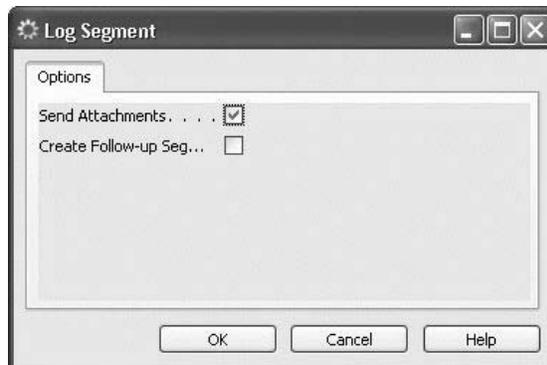
The program enters a check mark in the **Send Attachments** field by default.

2. As you want the program to print the letters, leave the check mark in the **Send Attachments** field.

3. Click **OK**.

The program automatically prints the letters, and logs the segment. Because the segment has been logged, you will not be able to find it in the Segment window any longer.

The program has automatically recorded an interaction for each of the contacts within the segment and has created an entry for the campaign.

Viewing Interaction Log Entries Linked to the Segment

You may need to view an interaction (such as a fax or a letter) that has been sent, for example, if the contact calls you about the interaction, and you do not remember the details. To view the interaction again, follow this procedure:

1. Click SALES & MARKETING→MARKETING→CONTACTS.

2. Find the contact card for the contact, and click CONTACTS→ INTERACTION LOG ENTRIES. The Interaction Log Entries window for the contact appears.
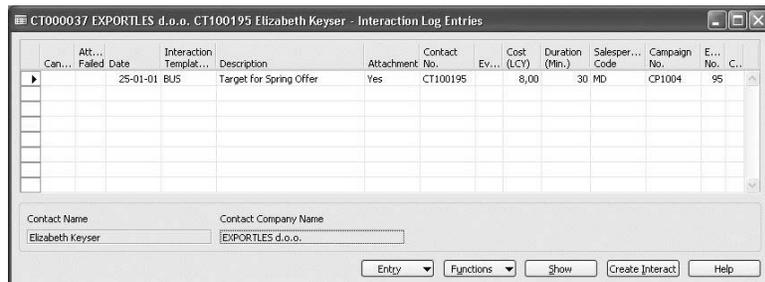
3. On the line with the relevant interaction, click the **AssistButton** to the right of the **Attachment** field.

The program automatically launches Microsoft Word and opens the interaction.

Viewing Campaign Entries Linked to the Segment

When you logged the segment, the program automatically created a campaign entry for the campaign. You can view this in the Campaign Entries window for the campaign.

Click SALES & MARKETING→MARKETING→CAMPAIGNS. Find the campaign card for the campaign and click CAMPAIGN→ENTRIES. The Campaign Entries window appears:
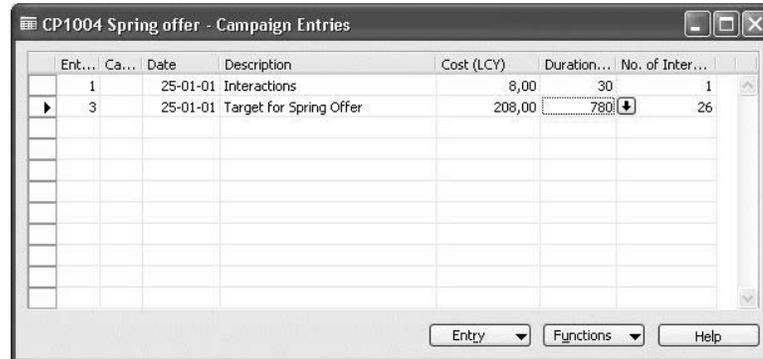
You can see the cost of the interaction and how many contacts you sent it to.

Creating Segments by Reusing Logged Segments

You can save time by creating segments from segments that have already been logged, instead of starting from the beginning. For example, you might want to create a segment similar to an existing segment, except for certain contacts. To create a segment by reusing a logged segment, follow this procedure:

1. Click SALES & MARKETING→MARKETING→SEGMENTS.

2. In the Segment window, place the cursor in one of the fields in the header and press F3.

3. In the **No.** field, press ENTER to have the program automatically enter the next available segment number.

4. In the **Description** field, enter a description of the new segment.

5. In the **Salesperson Code** field, enter the desired salesperson code.

6. Click FUNCTIONS→SEGMENT→REUSE→LOGGED SEGMENT. The Logged Segments window appears.
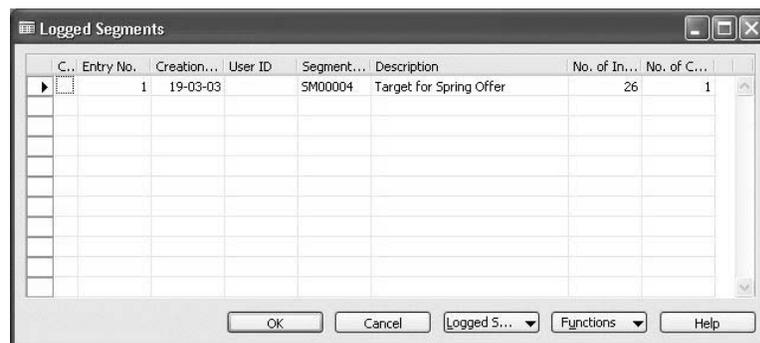
7. Select the line with the relevant logged segment, and click **OK**.

The program automatically fills in the lines of the Segment window with the contacts contained in the logged segment.

Now, you can manually remove any contacts that you do not want included in the new segment. To remove a contact, in the Segment window, select the line with the contact to be deleted and press F4. Then confirm the subsequent message.
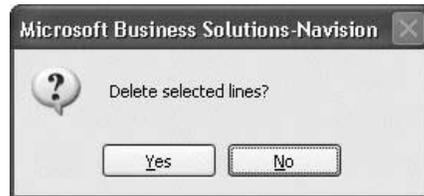
Repeat this procedure to remove any other unwanted contacts from the segment.

In the **No. of Lines** field, you can see the new number of contacts in the segment.

Recording Interactions

You can record interactions for an entire segment. If you are conducting a sales campaign, for example, and a large number of contacts have responded to your initial interaction, it is practical to set up a segment for the contacts that have responded, and then create their responses as interactions all at once, instead of creating an interaction for each contact individually.

Follow this procedure:

1. In the Segment window, click the **Interaction** tab.

2. In the **Interaction Template Code** field, click the **AssistButton**.

   There is no interaction template for recording responses to campaigns. You can create one:

3. In the Interaction Templates window, press F3.

4. In the **Code** field, enter RESP, and in the **Description** field, enter Campaign Responses.

5. Click **OK**.

6. Select the appropriate interaction template in the **Interaction Template Code** field. The following message appears:
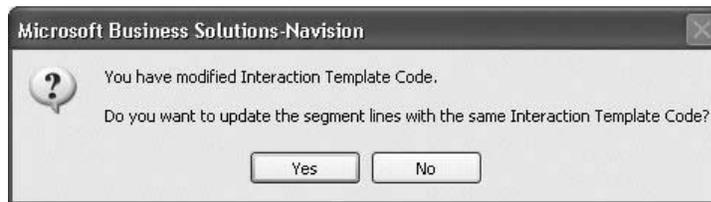
7. Confirm this message.

Entering Campaign Responses

To specify that these contacts have responded to the campaign, follow this procedure:

1. On the **Campaign** tab, in the **Campaign No.** field, click the **AssistButton**.

2. Select the appropriate campaign and click **OK**.

3. Leave the **Campaign No.** field, and confirm the subsequent message.
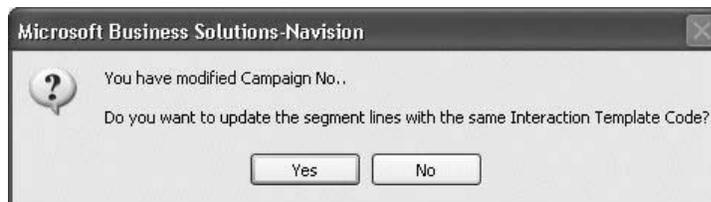
4. In the **Campaign Response** field, insert a check mark, and confirm the subsequent message.

Logging the Segment

To log the segment and record the interactions, follow this procedure:

1. Click **Log**.

2. In the Log Segment window, click **OK**.

3. Confirm the subsequent message.

Viewing Campaign Information

When you log the segment, the program automatically creates an entry for the campaign to record this action. You can view it in the Campaign Entries window for the campaign.

Creating Segments by Reusing Saved Segment Criteria

You can use saved segmentation criteria to create new segments. Follow this procedure:

1. Click SALES & MARKETING→MARKETING→SEGMENTS.

2. Place the cursor in the header of the Segment window and press F3.

3. In the **No**. field, press ENTER to have the program automatically enter the next available segment number.

4. In the **Description** field, enter a description of your new segment.

5. In the **Salesperson Code** field, enter the relevant salesperson code.

6. Click FUNCTIONS→SEGMENT→REUSE→SAVED CRITERIA. The Saved Segment Criteria List window appears.

7. Select the desired saved segment criteria and click **OK**.

The program automatically fills in the lines of the Segment window with all the contacts currently fulfilling the defined criteria.

Campaign Pricing

Companies operating in price-sensitive markets with diverse customer bases often need to set up promotional campaigns offering items at special prices for targeted segments of the market. The campaign pricing functionality greatly facilitates this process. It offers two different ways of setting up a promotional price campaign: Using fixed sales prices (see "Creating Sales Prices for a Campaign" below) and using discount percentages (see "Creating Sales Line Discounts for a Campaign" below).

Creating Sales Prices for a Campaign

When you have set up your campaign, decided what segments you want the campaign to cover, and set the Starting Date and Ending Date for the campaign, you register the sales prices for the individual items on the lines in the Sales Prices window.

To create sales prices for a campaign, follow this procedure:

1. Click SALES & MARKETING→MARKETING→CAMPAIGNS, browse to the relevant campaign, and then click CAMPAIGN→SALES PRICES. The Sales Prices window appears.

2. The **Sales Type Filter** field will be filled in with Campaign, and the **Sales Code Filter** field will contain the campaign number. As the campaign will cover the period defined on the campaign card for all items with sales prices, you cannot change the starting and ending dates on the individual lines. The program transfers the values from the **Starting** and **Ending date** fields on the campaign card to the lines in the Sales Prices window.

3. Fill in the fields on the lines with the Item No., the Unit of Measure, and the Unit Price to be campaigned. You can also show the Variant Code column and specify the Variant Code if there are several variants of the item.

4. If the customer has to purchase a minimum quantity in order to obtain the campaign price, fill in the **Minimum Quantity** field.

5. Using the Show Column facility, you can also specify the Currency Code and indicate whether a line discount and invoice discount should be allowed.

Repeat steps 3-5 for every item for which you want to create a Sales Price.

Creating Sales Line Discounts for a Campaign

When you have set up your campaign, decided what segments you want the campaign to cover, and set the Starting and Ending Date, you register the discount % that the customer will receive on the individual items on the lines in the Sales Line Discounts window.

To create sales line discounts for a campaign, follow this procedure:

1. Click SALES & MARKETING→MARKETING→CAMPAIGNS, browse to the relevant campaign, and then click CAMPAIGN→SALES LINE DISCOUNTS. The Sales Line Discounts window appears.

2. The **Sales Type Filter** field will be filled in with Campaign, and the **Sales Code Filter** field will contain the campaign number. As the campaign will cover the period defined on the campaign card for all items with sales prices, you cannot change the starting and ending dates on the individual lines. The program transfers the values from the **Starting** and **Ending date** fields on the campaign card to the lines in the Sales Prices window.

3. Fill in the fields on the lines with the Item Type (item or item discount group), the Item Code (this can be either the item number or the item discount group code), the Unit of Measure, and the Line Discount %. You can also show the Variant Code column and specify the Variant Code if there are several variants of the item.

4. If the customer needs to purchase a minimum quantity in order to obtain the campaign discount %, fill in the **Minimum Quantity** field.

5. Using the Show Column facility, you can also specify the Currency Code.

Repeat steps 3-5 for every item for which you want to create a Sales Line Discount.

Activating/Deactivating Sales Prices and Line Discounts in a Campaign

When you have set up the sales prices and/or line discounts and specified the segments on the campaign card, you must activate them to allow the campaign prices/discounts to be reflected on the lines.

To activate sales prices/line discounts in a campaign, follow this procedure:

1. Click SALES & MARKETING→MARKETING→CAMPAIGNS, browse to the relevant campaign, and then click CAMPAIGN→SEGMENTS.

2. On the **Campaign** tab, place a check mark in the **Campaign Target** field.

3. Close the Segment window.

4. On the campaign card, click FUNCTIONS→ACTIVATE SALES PRICES/LINE DISCOUNTS. A check mark appears in the **Activated** field.

*NOTE: In order to activate the sales prices/line discounts, the **Campaign Target** field on the Segment card must contain a check mark. If the sales prices/line discounts cover all the contacts in the segment, place a check mark in the **Campaign Target** field on the **Campaign** tab of the Segment card. If the sales prices/line discounts are not to be offered to all the contacts in the segment, you can remove the check mark from the **Campaign Target** field for the lines in question.*

If, for example, you want a campaign to stop before the ending date you specified when you set up the campaign, you can deactivate the sales prices/line discounts for that campaign.

To deactivate sales prices/line discounts, follow this procedure:

1. Click SALES & MARKETING→MARKETING→CAMPAIGNS and browse to the relevant campaign.

2. Click FUNCTIONS→DEACTIVATE SALES PRICES/LINE DISCOUNTS.

The sales prices/line discounts are deactivated, and the check mark disappears from the **Activated** field.

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*NOTE: If you remove the check mark in the **Campaign Target** field on either the segment card or the segment line, the sales prices and line discounts will be deactivated for either the segment or the segment line.*

Campaign Statistics

You can get a precise overview of how a campaign is going. You can view this information in the Campaign Statistics window.

To open the Campaign Statistics window, on the campaign card, click CAMPAIGN→STATISTICS, or press F9.

The Campaign Statistics window looks like this:

In the **Response Rate %** field, you can see the percentage of contacts contacted by the campaign who have responded to it.

In the **Avg. Cost per Response** field, you can see how much you have spent on each response that you have received.

In the **Avg. Duration per Response** field, you can see how much time you have spent on each response that you have received.

Test Your Skills – Planning a Campaign

Scenario: You are going to start a new national campaign to promote your new Millennium office furniture series. You need to plan the campaign, decide which contacts to target with the campaign, and save the segmentation criteria that you use so that you can apply them again next year.

1. Record the new campaign in the program and call it Promoting Millennium Series.

    After a few weeks, you publish an advertisement, and the campaign is actually started.

2. Modify the status of the campaign directly on the campaign card.

    In order to promote the new Millennium office furniture series, you have planned another action that consists of sending a mailing to a specific group of contacts. The mailing will consist of a letter introducing the office furniture series.

3. Create a segment (called Target for Millennium Campaign) made up of contacts with the following characteristics:

    –   Include contact persons who are prospective customers and responsible for purchases at their company.
    –   Do not include contact persons who received the Christmas card because they have already received the letter, so you do not want to include them in the segment.

4. Save the segmentation criteria that you have used to select this segment so that you can apply the criteria next year to your database. Link this segment with the campaign you have created for the promotion of the Millennium office furniture series.

5. Set up the letter that you would like to send to all the contacts within the segment. You can do this directly from the Segment window. You have already created the letter that you want to send to your contacts. You have inserted it as an attachment for the CANVAS interaction template.

6. Personalize the letter to Amy E. Alberts from EXPORTLES d.o.o., one of the contacts within the segment, by adding the following sentence at the beginning of the letter. "It was a pleasure meeting you at the trade show last week."

7. Print labels with the names and addresses of the contacts within the segment.

8. It is now time to send the letters for the campaign. Print them and record them as interactions in the program.

Test Your Skills – Recording Responses

Scenario: Now you need to create another segment to record the contacts that have responded positively to the Millennium office furniture campaign. You can create this new segment, using the segment that you have already logged.

1. Create a new segment containing the same contacts as the first segment, except for one contact (Shelley Dick) who has not responded to the campaign. Create the segment using the segment that you have already logged.

2. Record as an interaction that the contacts in this new segment have responded positively to the campaign by asking for more information.

3. Log the segment and record the interactions.

Test Your Skills – Using Saved Segmentation Criteria

Scenario: A year has passed, and you have got a new office furniture series to promote, the Futurus series. The campaign you made last year was a great success, and you would like to target the same category of contacts. As you have added several prospective customers to your database since last year, you cannot use the logged segment to create the new segment. But, last year you saved the segmentation criteria that you used for the first segment.

1. Create a new campaign called Target for Futurus Campaign.

2. Create a new segment called Target for Futurus Campaign.

3. Use the saved segmentation criteria to select the contacts to target for the new campaign.

Quick Interaction: Lessons Learned

Take a moment to write down three Key Points you have learned from this chapter:

1.

2.

3.

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