Advanced
Business Solutions
Advanced Legal

ALB

Marketing (Agenda)

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Marketing

Edited by Nicola Harlow (17-02-2015)

Marketing allows you to create campaigns to market your firm.

Setting up marketing

Setting up Marketing

You will need to set up several items before you can use Marketing.

You should first create a separate department and work type for Marketing will allow budgets for time and disbursements to be set for the campaign. Departments and work types are created in the **Core PMS** section of **Utilities**.

You will also need to set up:

- Campaign Types
- Contact Groups
- Response Types
- Supplementary details

Marketing: Campaign Types

You will need to set up several items before you can use Marketing.

Campaign types can be used for reporting to see which types bring the best return.

1. Open **Utilities**.
2. Select **Modules**, click on the **Marketing** folder, and double-click on **Campaign Types.**
3. Right click on the right hand side of the screen and select **Add New Campaign**.
4. Enter a description. Suggested types may be:
    - Email Campaign
    - Mail shot
    - Seminar
5. Click on **OK** to save.

Marketing: Contact Groups

You will need to set up several items before you can use Marketing.

Groups can be used to segment the target audience to allow for targeted campaigns.

Groups are user defined lists and will vary from practice to practice but suggested defaults could be:

- Clients without wills
- PLC
- Commercial Clients
- Referrals in a geographic area

A group is created by using the existing entries in the Client, Contact and Services directory. This list can be used over and over again, and new members added to it and existing ones removed.

1. Open **Utilities**.
2. Select **Modules**, click on the **Marketing** folder, and double-click on **Configure Contacts.**
3. Right click in the Groups area and select **Add Top Level Group**.
4. Enter a name in the description field and click on **OK** to save.

   If sub groups are needed, right click on the top level group name and select **Add** group, enter a name for the sub group and click on **OK**.
5. You can now add entries to the group, Clients, Contacts and Service Contacts. The groups can contain a combination of the three types, for example, a group called Senior Partners Contacts may be used for his retirement party and can include existing clients, personal contacts and other service contacts.

   - To add members to the group, click **Search** and the standard PMS search screen will appear.
   - Double click on a member to add to the list.
   - To include multiple entries, hold down the CTRL key and select entries to highlight them. Right click one of the highlighted entries and choose **Select Client/Contact/Service**. The names will now be added to the list.

6. When the list is complete, close with the cross at the top right hand side.

TIP Groups can be populated from Utilities for the convenience of system administrators but this option is also available to other users from the **Contacts Groups** button in the **Marketing** group on the **Tools** Ribbon.

Marketing: Response Types

You will need to set up several items before you can use Marketing.

Response Types are used to indicate what response has been received from the recipients of a campaign.

1. Open **Utilities**.
2. Select **Modules**, click on the **Marketing** folder, and double-click on **Response Types.**
3. Right click on the right hand side of the screen and select **Add Response Type**.
4. Enter a description. Suggested types may be:
   - Not responded
   - Will attend
   - Declined
   - Would like more information

> 1. **NOTE** the first response in the list will be the one listed by default when a response is added.

5. Click on **OK** to save.

Marketing: Supplementary details

You will need to set up several items before you can use Marketing.

Supplementary details can be used to target clients, matters, contacts or services. They are set fields that are created in Utilities and are then applied to the relevant recipient. For example, there is a field called

Newsletter that can be answered Yes or No. In Marketing it is possible to search on the supplementary field called Newsletter and display all that have an answer of yes.

To edit existing fields or to create new ones ...

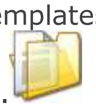
1. Go to **Utilities » Firm Options** and select **Supplementary Details**.
2. To add new fields, right click on the heading **Fields** and select **Add Fields**.
3. To edit existing fields, double click on the field name.
4. In both cases complete the field details as required and click on **OK** to save.

For instructions on how to use the groups and categories refer to the Utilities manual.

Marketing: Creating Document and Email templates

You will need to set up several items before you can use Marketing.

Marketing letters and email templates are created in **Utilities »**

Document & Agenda Setup. 

Under the heading Document Production is a sub folder called Document Templates. Click on Document templates, all templates will be displayed on the right hand side of the screen, to display the marketing templates only, select Marketing from the Application drop down list.

To add a new template:

1. Right click in the right hand side of the screen and select **Add New PMS document template**.
2. Enter the code of the letter, the description and make sure the application is set to **Marketing**.

3. The other fields on the screen are not mandatory and can be ignored.
4. Click on **OK** to save.
5. The document template will now open in Word.
6. To locate the ALB merge fieldcodes, click on ALB Menus.
7. Expand **Insert Merge Fields** and locate the relevant field codes.

> NOTE **select the role of Client only.**

8. Complete the rest of letter or email template and then save and close. The template is now available within the marketing module.

See the Document Production Manual for further instructions on creating merge templates.

Marketing: Updating client/contact/services information

You will need to set up several items before you can use Marketing.

Client Details

For clients that do not want to receive any marketing literature, open the client, go to the **General Details** tab and remove the tick in **Receives Marketing**.

> NOTE For deceased clients to be automatically excluded from marketing, their date of death must be entered in the Individual Details tab.

Contact/Services Details

For contacts or services that do not want to receive marketing literature, you can set the marketing flag to no.

For a contact, open the contact and deselect the **Is receiving marketing** field on the **Individual Details** tab.

For a service, open the service and deselect the **Is receiving marketing** field on the **Service Details** tab.

Adding a matter into the Marketing Module

The marketing module is accessed using the Firm Client (Unique reference Z00001 or Z10000). For each campaign you will have to create a separate matter.

> **TIP** A yellow book icon next to the matter number will indicate that matter is in the marketing module.

1. Open PMS.
2. Search for the **Firm Client**, and open.
3. Add a new matter via **Actions » Add Matter for Client**.
4. From the new matter, as the Marketing module via **Actions » Add Module**, select **Marketing** and click **OK**.
5. Add the **Description** of the Campaign, **Start Date** and whether you are cloning an existing campaign.
6. In the lower part, select the campaign type, if new, or the campaign you wish to clone.
7. Click **Finish**.

- Campaign Details tab
- Contacts/Responses tab

Marketing: Searching for existing Campaigns

To search for existing campaigns ...

1. Go to the **Tools** ribbon, **Search for Campaign**.
2. Search on the campaign name or dates the campaign was created.
3. Click on **Refresh** and the results will appear in the right hand side of the screen.
4. Double click on the campaign name to open it.

Marketing campaign details

Marketing: Campaign Details tab

This tab is to show the results of the completed marketing campaign i.e. how many new matters have arisen, how much revenue has been generated etc.

Enter the budget costs and expected revenue for this campaign.

Campaign Information

- **Start date** – the date the campaign was created
- **No of Contacts** – how many contacts were targeted in the campaign
- **No of Responses** – how many responses have been received (and recorded against contacts)
- **No of New Entities – how many new clients/contacts/services have been added as a result of the campaign**
- **No of New Matters** – how many new matters have been added as a direct result of the campaign

Campaign Costs/Revenue

- **Budget Costs** – Manually enter amount of expected costs for the campaign
- **Actual Costs** – Total of time and disbursements recorded against this campaign
- **Time Costs** - Shows how the limit is progressing against the actual time posted
- **Disb Costs** - Shows how the limit is progressing against the actual disbursements posted
- **Budget Revenue** – Manually enter amount of expected revenue
- **Actual Revenue** – this is derived from the amount of costs received net of VAT (from office bill payment posting)

Response Breakdown

Shows a graphical representation of the responses recorded against the contacts.

Marketing: Contacts/Responses tab

You can add contacts to the marketing campaign.

1. Right click on the **Contacts** screen to add recipients, three options are available:

    - Assign Client Contacts
    - Assign General Contacts
    - Assign Service Contacts

2. Search for the contacts you want to add.

    3. To add a single entry: Double click on the name.
    4. To add multiple entries: Hold down the CTRL or SHIFT key, select the names that are required.

3. right click and chose **Select client/contact/service**.

> **NOTE** Clients/Contacts with a date of death entered are automatically excluded. Those that do not have the "Is receiving marketing" field ticked are not attached to the campaign.

To update or check the contacts details, for example to add an email address, double click on the contacts name.

To remove a contact from the list, right click on the contact and select **Remove contact**.

Exporting the contact list to Excel

You can export a list of selected contacts to Microsoft Excel. You might want to do this in order to use the information for a Word mail merge. To export to Excel:

1. On **Marketing Details**, **Contacts** tab, click to select the contacts you want to include in the export list. To select all contacts, click the top contact to select it then hold down SHIFT and press ↓ or PAGE DOWN until all are selected.

2. On the **Actions** menu, select P**roduce Excel Spreadsheet**.

3. The Excel spreadsheet opens listing the selected contacts.

Marketing: New Entities/Matters

A list of any new clients, matters, contacts or services as a result of the campaign are displayed on the New Entities/Matters screen. Right clicking on the matter or the contact gives the option to view.

Marketing: Linking new clients/matters/contacts to the campaign

Any new clients, matters or contacts that occur as a result of the campaign need to be linked back to their campaign. There is a field called Source Campaign, click on the magnifying glass and select the campaign.

Clients

For clients, the field is on the general details tab.

Matters

For matters, the field is on the Additional Info tab.

Contacts/Service Contacts

For Contacts, the field is on the Individual details tab.

Services

For Services, the field is on the Service details tab.

Marketing: Documents Tab

The document tab shows the documents that have formed the marketing campaign.

Double clicking on any document opens it for review.

Marketing: Notes tab

Notes can be added to the campaign using the **Add New Note** button.

Double Click on an existing entry for review.

Marketing: Diary tab

You can create marketing related appointments and tasks from here.

To create Appointments and tasks from the matter, click on the **Diary** tab.

Add Appointment

1. Right-click and select **Add appointment**.
2. Complete the fields and click on OK. The appointment is displayed both in the diary tab and in the main PMS diary Refer to the separate Diary manual for further details.

Add Task

1. Right-click and select **Add task**.
2. Complete the relevant fields and click **OK.** As well as appearing in the main PMS diary the task is displayed on the diary tab with a summary of the main details

Edit Selected Appt/Task

1. To edit an existing appt/task, right-click on the appt/task and choose **Edit Selected Appt/Task**.
2. This will open the original screen, make the necessary changes.
3. Click **OK** to save

Delete Selected Appt/Task

CAUTION Deleting an appointment or task will delete all data for that appointment or task.

1. To delete an existing appt/task, right click on the appt/task and choose Delete Selected Appt/Task.
2. A cancellation screen will open, fill in the reasons (optional) for deleting the appt/task.
3. Click **OK**.

Print Tasks

To print diary entries for this matter, right click and choose **Print Tasks**, select from **Print All**, **Tasks Only** and **Appointments Only**.

Marketing: Running a campaign

The campaign is run from the Actions menu:

Record Time

Allows a user to record time as the campaign is prepared. Time spent on the campaign is displayed as actual costs on the Campaign details tab.

Accounts Enquiry

View the financial information regarding the marketing campaign.

Produce Document

This produces a single document to a selected recipient. It can be used if the intended recipient was missed off the original list or to test prior to running the document campaign.

1. On the **Contacts/Responses** screen, highlight the intended contact.
2. Go to **Actions » Produce Document**, a screen with marketing documents will be displayed.
3. Double click on the document that is to be merged.
4. Once the document has been printed or cancelled, a document history screen is displayed. This screen will allow the merged document to be saved onto the campaign and also for the user to time record the production of the mail merge. Select **Save** (document only) or **Save & Time** (document & time recording).

Produce Email Campaign

Sends bulk emails to the contacts on the campaign.

CAUTION Prior to running the campaign, you should test the email first to make sure it is running correctly, and using the correct email addresses.

The email being sent is a Word document that is merged into the body of one email per recipient. A dialogue shows its progress and lists any contacts without email addresses.

If all contacts are to receive the email there is no need to high light them, however, if the email is only being sent to specific contacts, the contacts must be highlighted prior to clicking on Produce Email Campaign.

1. From **Actions » Produce email campaign**, double click on the template to be emailed.

2. A dialogue box is displayed showing the percentage of the progress of the mail merge, and will display any errors e.g. no email address, wrong email address.

3. An Outlook message asking for authority may appear, click to allow access.

4. The emails will automatically be sent from Outlook.

5. The document history screen is displayed in the marketing module. This screen will allow the merged document to be saved onto the campaign and also for the user to time record the production of the mail merge. **Select Save** (document only) or **Save & Time** (document & time recording).

TIP The Outlook Client asks for user authority before sending any emails generated by a third party product. It may worth speaking to your IT team about installing a third party tool such as ExpressClickYes to turn off this security feature when running bulk email campaigns.

Produce Document Campaign

Produces bulk documents to the entire campaign.

CAUTION Prior to running the campaign, you should test the document to ensure it is compiling correctly.

The mail merge being produced is a Word document that is merged as a single document.

The letters are separated by a page break.

This makes it easier for printing (you may not want to print all documents in one run).

1. Highlight the recipients of the mail merge, if all contacts are to receive the document use the command **CTRL A** (Select All) , however, if the document is only being sent to specific contacts, the contacts must be highlighted first (hold down the CTRL key and click on the contact) .

2. From **Actions » Produce Document campaign**, double click on the template to be produced. The document will be merged for each recipient, if any data is missing, a merge assistant screen will be displayed next to the document, enter the missing data and click continue.

3. The document is now in Word. To save the document (if required), go back into the Marketing module where the document history screen is displayed. This screen will allow the merged document to be saved onto the campaign and also for the user to time record the production of the mail merge. **Select Save** (document only) or **Save & Time** (document & time recording).

Produce Sample Email

This produces a single email to a selected recipient. It can be used if the intended recipient was missed off the original list or to test prior to running the email campaign.

CAUTION Prior to running the campaign, you should test the email first to make sure it is running correctly, and using the correct email addresses.

1. On the **Contacts » Responses** screen, highlight the intended contact.

2. Go to **Actions » Produce Sample Email**, a screen with marketing documents will be displayed, double click on the document that is to be emailed.

3. An Outlook message asking for authority may appear. Click to allow access.

4. The document will merge into Outlook as an email, it will not automatically be sent.

5. Once the email has been sent or cancelled, a document history screen is displayed. This screen will allow the merged document to be saved onto the campaign and also for the user to time record the production of the mail merge.

Quick Letters

Allows access to ad hoc documents.

Marketing: Deleting the campaign

You can delete the campaign.

CAUTION Deleting the campaign will delete all data for the campaign.

1. In the campaign, select the **Actions** menu then **Remove From Module**.
2. The campaign will be deleted.

Marketing: Adding responses

You can add responses to the campaign.

1. In the campaign, select the contact you want to add the response for.
2. Select the **Actions** menu then **Adding responses**.
3. Enter the response for that contact.
4. Click on **OK** to save. Repeat for each contact.

Marketing: Viewing responses

You can view responses to the campaign.

In the campaign, right-click the contact to display the following options:

- **View response** – view/edit the response
- **View contact** – view/edit the contacts details
- **Delete response** – delete response if incorrect
- **Produce Document** – a follow up letter may be sent to the contacts that have not responded. To make the selection easier, click on the column heading Resp. Type which will sort alphabetically and highlight the contacts that have not responded.

Marketing: Reports

There are two marketing reports that can be run. The individual campaign summary report and a wider report which shows all campaigns for a chosen period.

Individual Campaign Summary

From within the marketing module, go to the Reports heading and select Campaign Summary.

Campaign Summary Report for a period

1. On the ribbon bar, under marketing, select **Search for Campaign**.

2. Use the **Reports** menu to access the report, enter the dates on which to run the report.

Additional pages show a graphical overview and also identify the top clients by fees recovered. There are two marketing reports that can be run.

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2. Select **Campaign Summary**.

Campaign Summary Report for a period

1. On the ribbon bar, under marketing, select **Search for Campaign**.

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