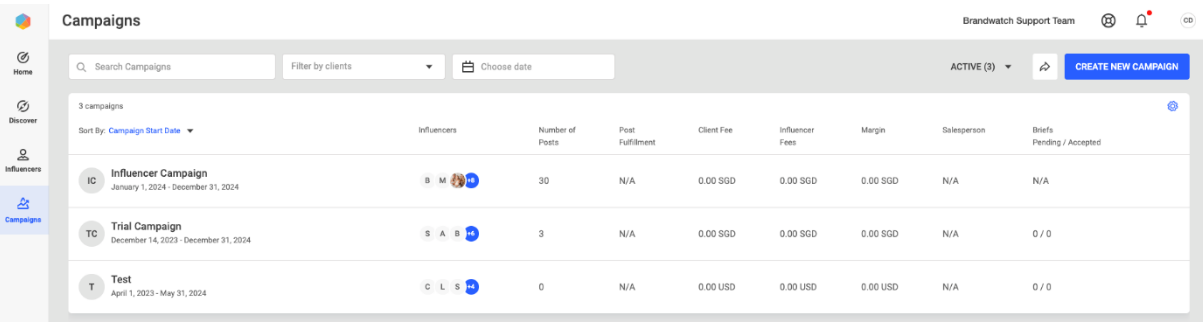
Campaign Creation, Proposal, and Reporting

Note:

The features described in this article are available to Pro and Premium Influence clients. If you are interested in Influence's full suite, please contact your Customer Success Manager (CSM) for details.

Navigating the Campaigns tool

In the Campaigns tool homepage, you see a record of all of your active, completed, and archived campaigns and also see the option to create a new campaign in the top-right corner.

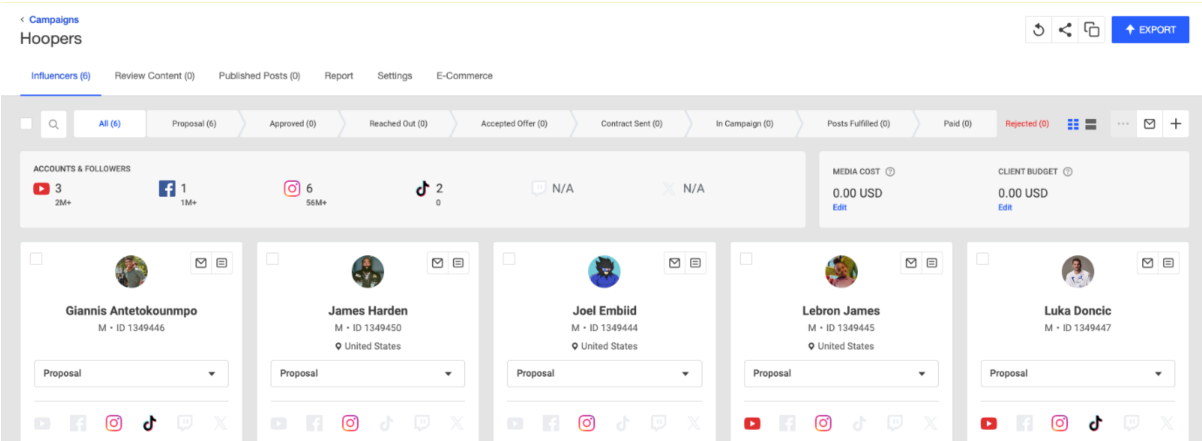


The existing campaigns listed will show the date range for the campaign as well as which influencers are participating in the campaign, the number of posts, the post fulfillment status, the client and influencer fees with margin, the salesperson on the campaign, and any pending/accepted briefs. You can use the search bar on the Campaigns homepage to search for a specific campaign or use the available filter and search drop-down menus to filter campaigns by client, date range, campaign status (e.g. Pending, Active, Completed, or Archived), and more. You will also see the option to export your campaigns data.

Viewing individual campaigns

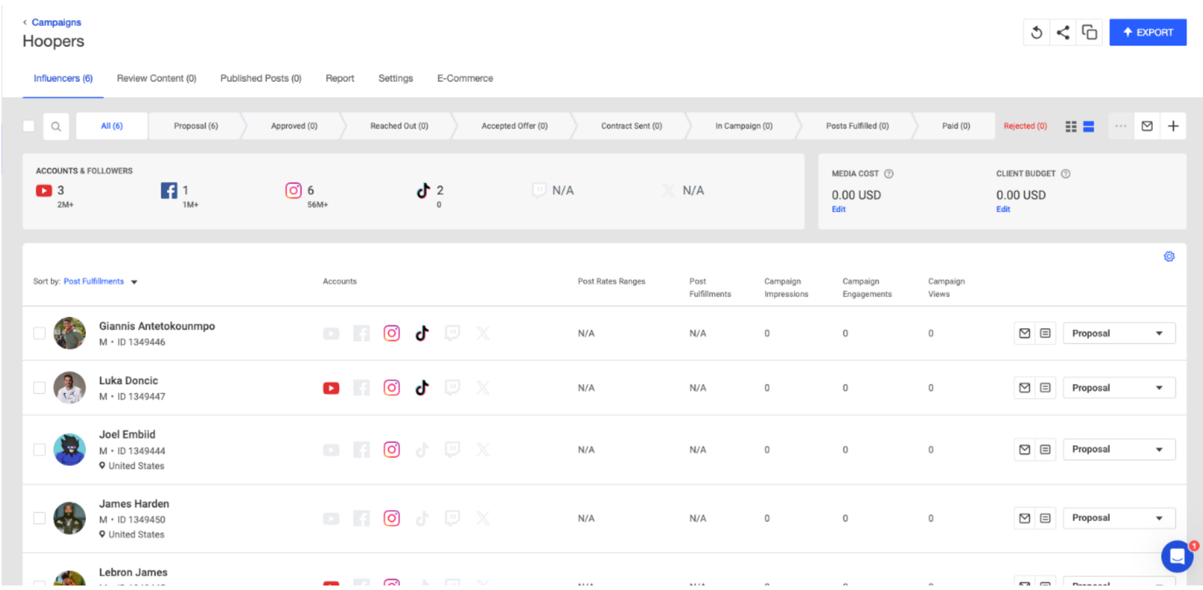
When you click into an individual campaign, you can choose to view it in either **List view** or **Card view**. In either of these views, you can easily click on the influencer to view their complete profile.

Card view:



When looking at a campaign in Card view, you can view the influencer's different social media accounts, ID, age, gender, location, post rates, and more. This is a concise way to view all of the influencers in your campaign.

List view:



When looking at a campaign in List view, you will see all of the same information as in Card view, as well as the influencer's campaign performance metrics.

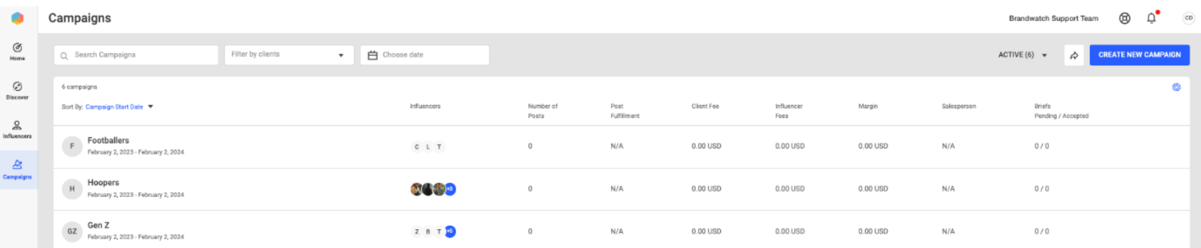
If you click into an individual campaign, you'll have six different tabs to toggle between:

- **Influencers:** Shows a list of all the influencers that are included in the campaign, and the option to add or remove influencers. You can also track an influencer’s [campaign state] in the onboarding process, or see their progress in fulfilling their posts.

- **Review Content:** You can ask influencers to submit their campaign posts for review and approval before they publish them. Influencers can submit their post content for approval from their own Influence dashboard.
- **Published Posts:** You’ll see all of the posts currently being tracked based on the keywords you selected. You can filter by platform, influencer, and date posted, and also sort by publishing date, views, or engagements. You also have the option to filter to see all of the posts made by an influencer within a selected date range, including posts that are currently not being tracked. This is helpful in case influencers forgot to use the campaign keywords in their post metadata.
- **Report:** In the Report section, you will see the performance of your campaign and export a report. You can see daily or cumulative campaign statistics in addition to what type of audience has been viewing your influencers’ posts. It also shows you how close you are to fulfilling any set campaign goals in terms of posts, impressions, and views.
- **Settings:** This is where you can edit your campaign settings and information and add more keywords and hashtags that will determine which posts will automatically be pulled into the campaign. You can also set total campaign goals to reach, such as a certain number of views or engagements, and what types of posts the influencers need to publish in order to fulfill the requirements set by you or the brand.
- **E-commerce:** If enabled for your organization, you can use this tab to see and track your Shopify analytics.

Creating a new campaign

To create a new campaign, navigate to Campaigns in Influence and click the **Create Campaign** button in the top-right corner. This will open a popup window for you to fill out your campaign details.



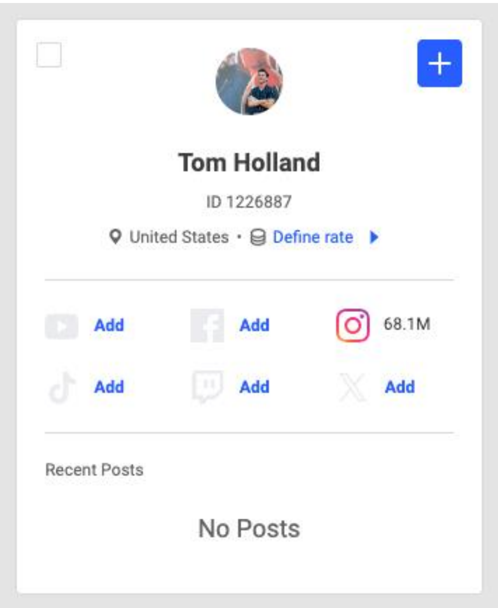
The campaign details are as follows:

- **Campaign Name:** Enter the title of your campaign.
- **Client:** Enter the brand or company that the campaign is for.
- **Campaign Date Range:** Enter the dates that the campaign will run.
- **Timezone:** Enter the timezone that the majority of your campaign influencers will post in.
- **Currency:** Enter the currency you will use to pay your influencers, if applicable.
- **Post Detection Keywords:** Enter the keywords, hashtags, or mentions that the influencers will use in their campaign posts. Influence will automatically pull posts with these keywords into this campaign for post tracking.
- **Salesperson:** The main salesperson assigned to this campaign.
- **Proposal and onboarding process:** Choose whether or not to enable the automated proposal and onboarding process. The automated campaign proposal and onboarding flow helps you manage each step from the Proposal state to the Paid state, allowing you to keep track of where in the process each influencer is and utilize onboarding features like sending campaign briefs or contracts.

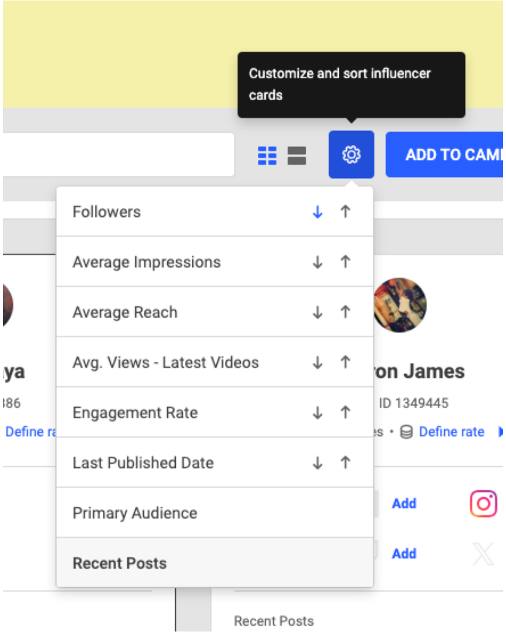
When you are finished, click **Create and Continue** to add influencers to your campaign.

Adding influencers to a campaign

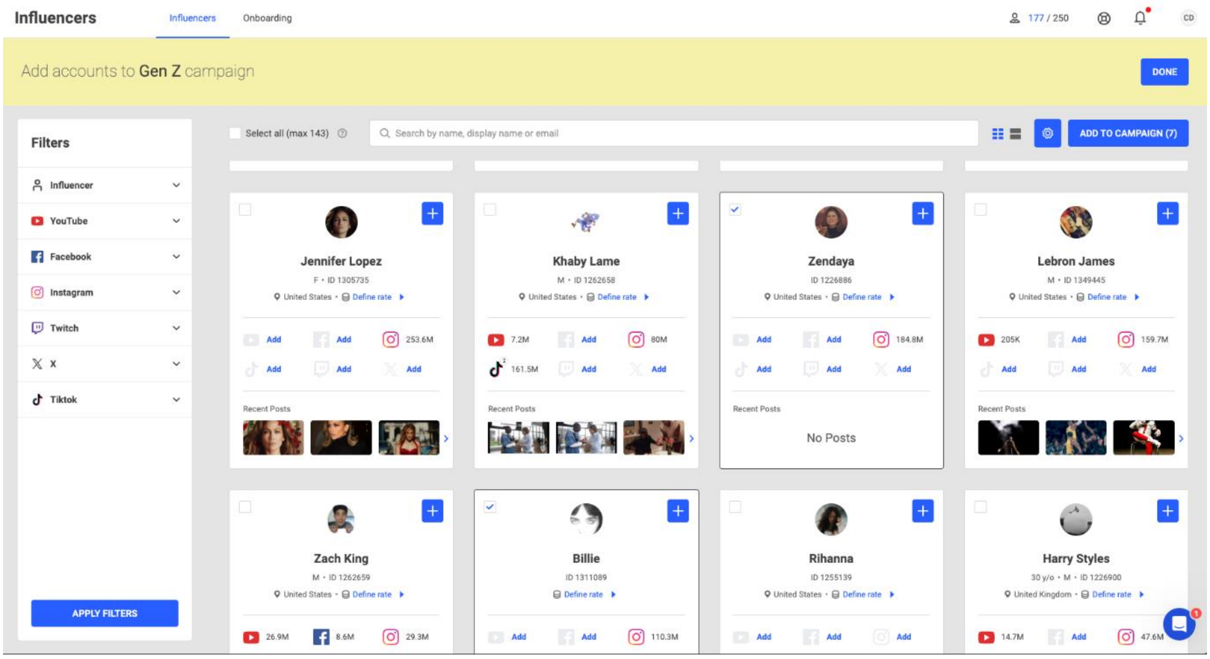
After you create a new campaign, you will be brought back to the Influencers tab to add influencers to the campaign. Start by clicking the **blue plus (+) icon** in the upper-right corner of an influencer's profile to add them to the campaign, and you will see a pop-up notification that the influencer was added.



You can also add influencers to your campaign in bulk. Click the checkbox in the top-left corner of each influencer's card, or check the **Select all** checkbox in the top-left of the page to add your entire influencers list. The **Select all** checkbox will allow you to add up to 150 influencers to your campaign. If you have more than 150 influencers, it will add only the top 150. In order to sort these influencers, you can click the **blue gear icon** in the top-right of the page and filter them by followers, engagement rate, and more.



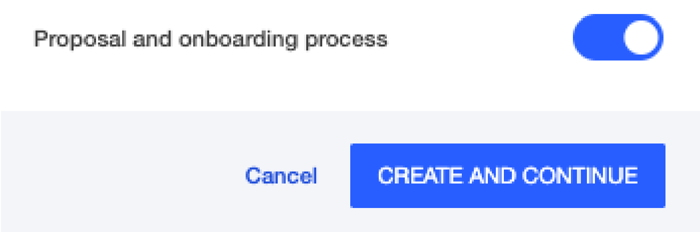
If you have added multiple influencers, you must click the blue **Add to campaign** button in the top-right side of the screen to confirm adding the influencers you have selected. When adding a large number of influencers, this may take a moment to complete. You will see a pop-up notification saying "Adding selected influencers! This may take a minute," at the top of your screen. When the task is complete you the pop up will change to "Your influencers have been added."



When you are finished adding influencers, click **Done** in the top-right corner of the page to create your campaign, and you will be brought to your campaign page.

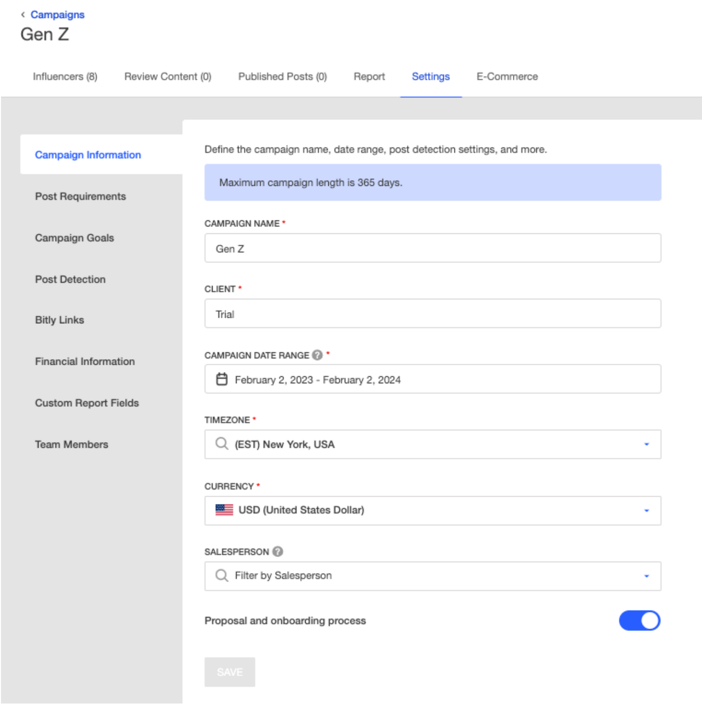
Using the campaign proposal and onboarding process

If you enabled the **Proposal and onboarding process** toggle when you set up your campaign, you will see a process flowchart at the top of the Influencers tab in your campaign.



Tip:

You can turn the proposal and onboarding process on or off at any time in the [campaign settings].



Proposal and onboarding states

The campaign proposal and onboarding flow consists of eight states:

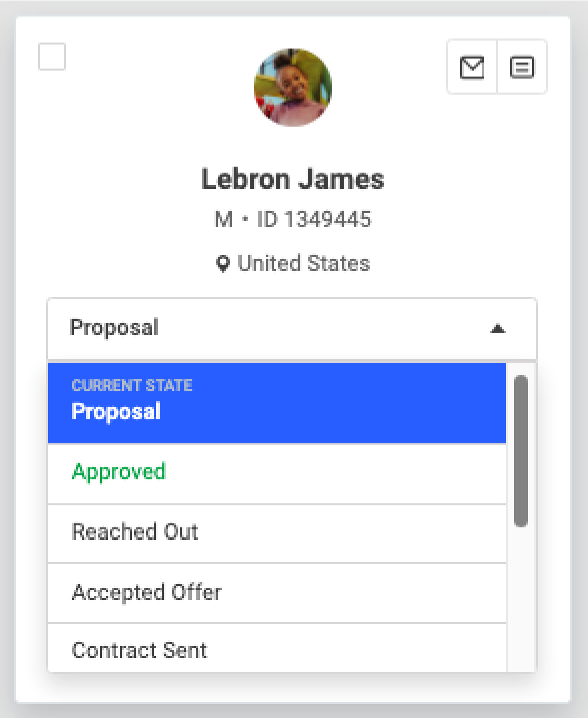
- **Proposal:** Influencers in this state have been shortlisted by you because you think they might be a good fit for the campaign. When you send a campaign proposal to your client, they can review and approve/reject the influencers you have selected.
- **Approved:** The influencer has been approved by you or your client to participate in the campaign.
- **Reached Out:** You have sent a message to the influencer to see if they are interested in participating.
- **Accepted Offer:** The influencer has accepted the campaign opportunity.
- **Contract Sent:** You have sent a campaign contact to the influencer and are waiting for their signature.
- **In Campaign:** The influencer has signed the contract and is ready to start posting content for the campaign.
- **Posts Fulfilled:** The influencer has published all the required posts for the campaign.

- **Paid:** The influencer has been paid for his or her participation.

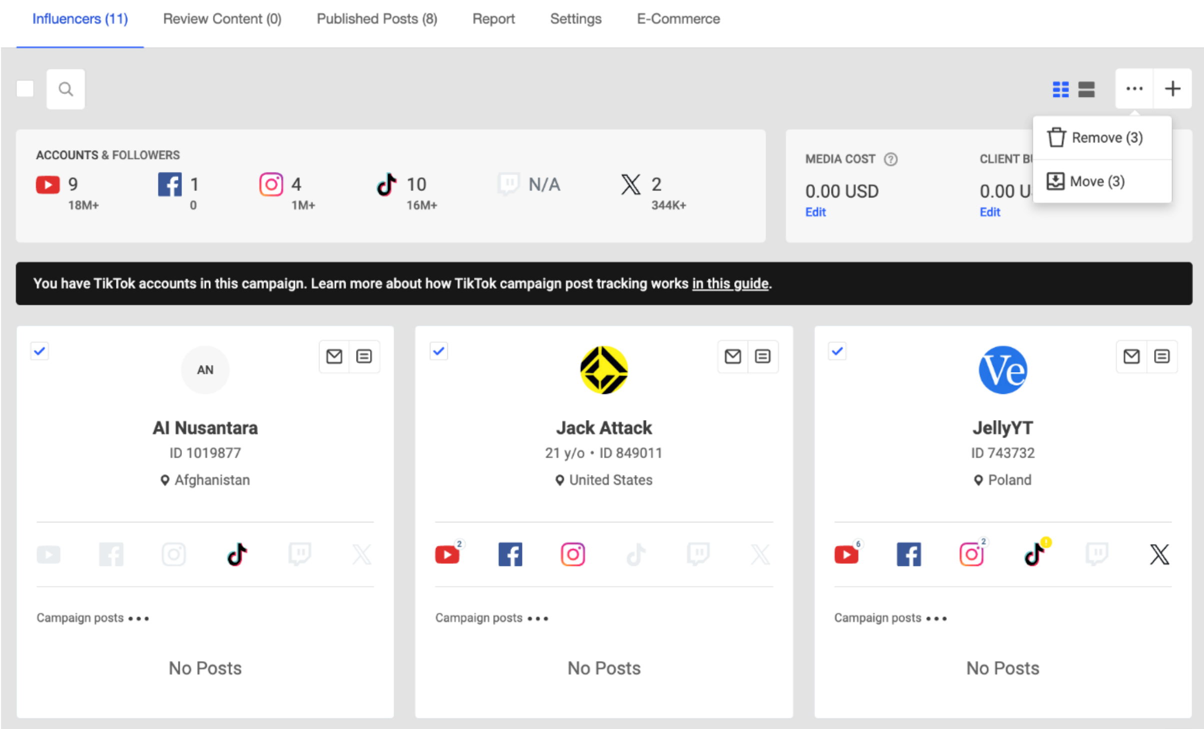
There is also a state for the **Rejected** influencers to the far right of the onboarding flow. This state will include all influencers who were either rejected by the brand client or who were approved but chose to not participate.

Moving influencers through the campaign onboarding flow

You can manually move an influencer forward in the process by changing their state via the dropdown on their campaign card. You can choose to either move them one step forward or one step backward.



Additionally, you can move influencers into different states in bulk. To select all influencers in your campaign, select the checkbox at the top left of the screen, or select influencers individually by clicking the checkbox in the top left of their influencer profile card in card view, or to the left of the influencer in list view:

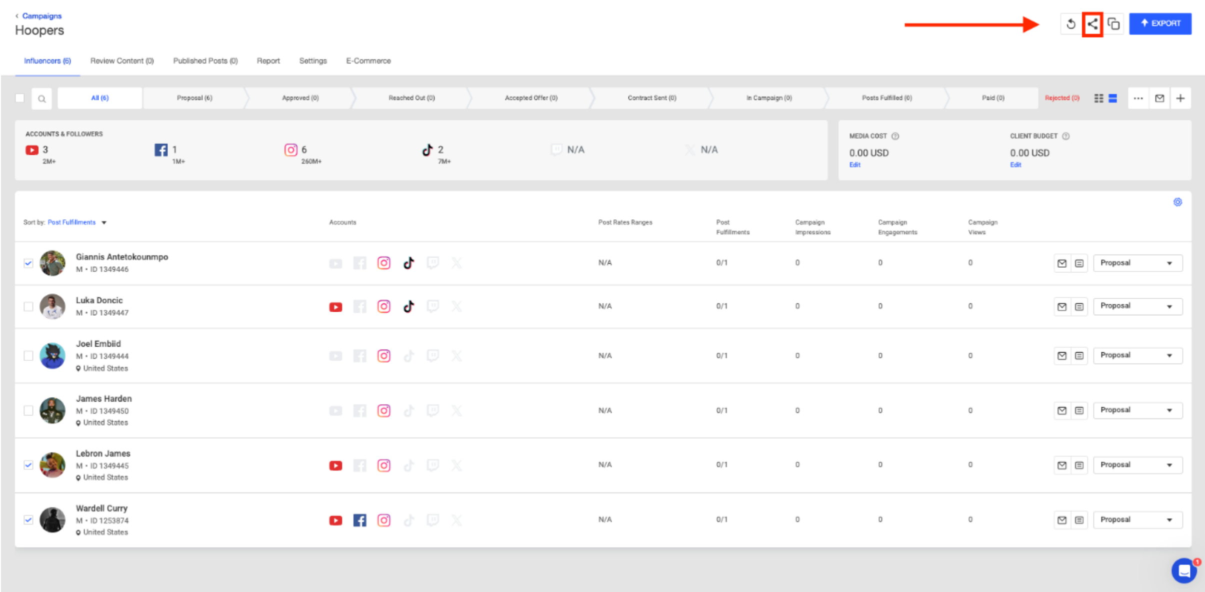


After selecting influencers, select the **ellipses (three dots) icon** in the top-right of the page to either move the influencers or remove them in bulk.

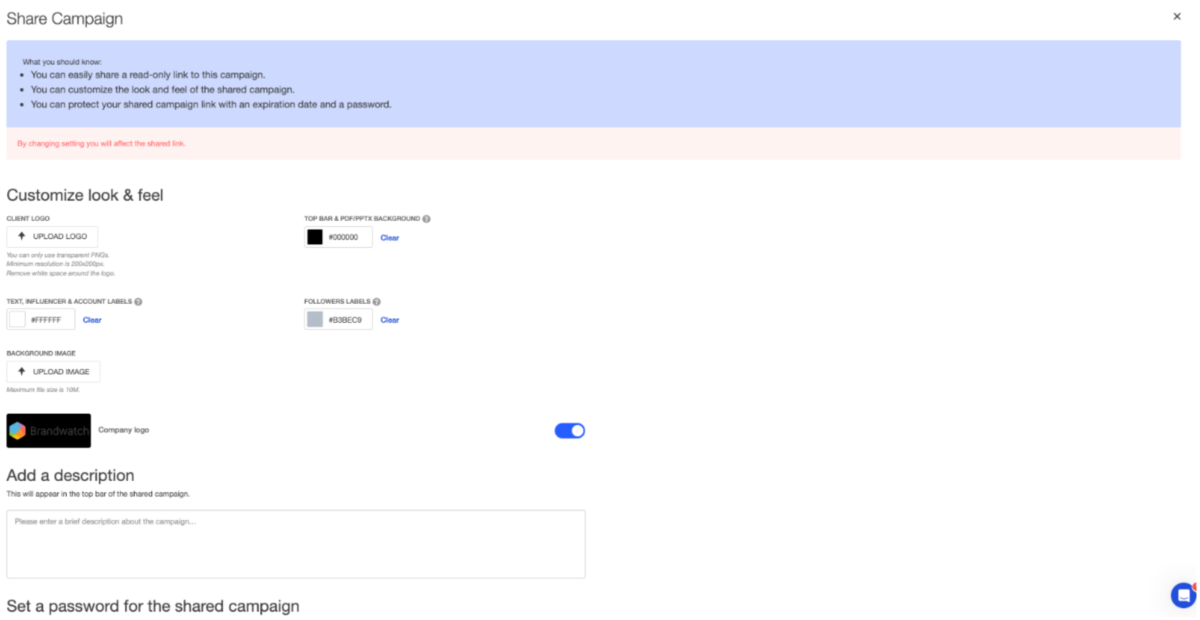
Sending a campaign proposal to your clients

To create a campaign proposal for your clients, first make sure you toggled on **Proposal and onboarding process** during your campaign setup. If needed, toggle on this option in your campaign settings.

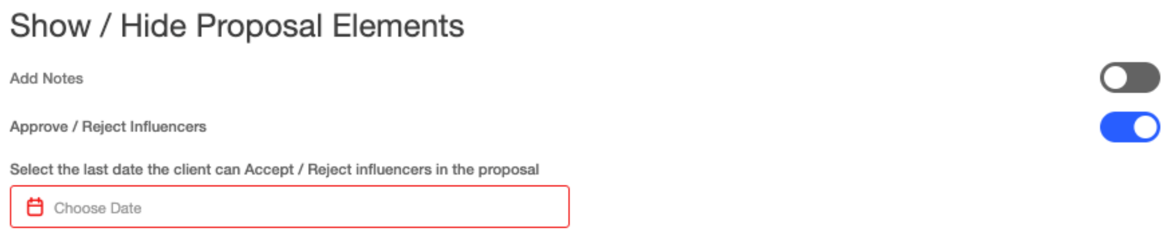
From your campaign page, click on the **Share** icon in the top-right corner of the campaign.



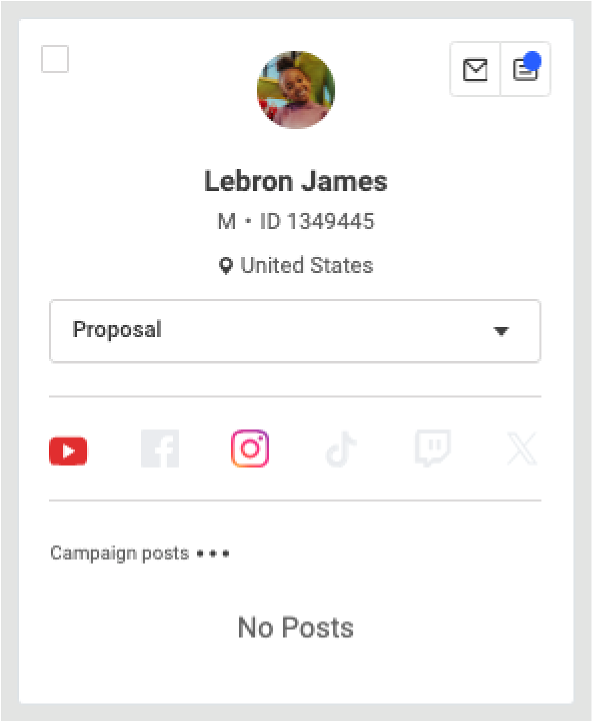
The following page will allow you to select sharing settings to customize the report elements.



At the bottom of this view, you'll find two settings related to proposal elements:

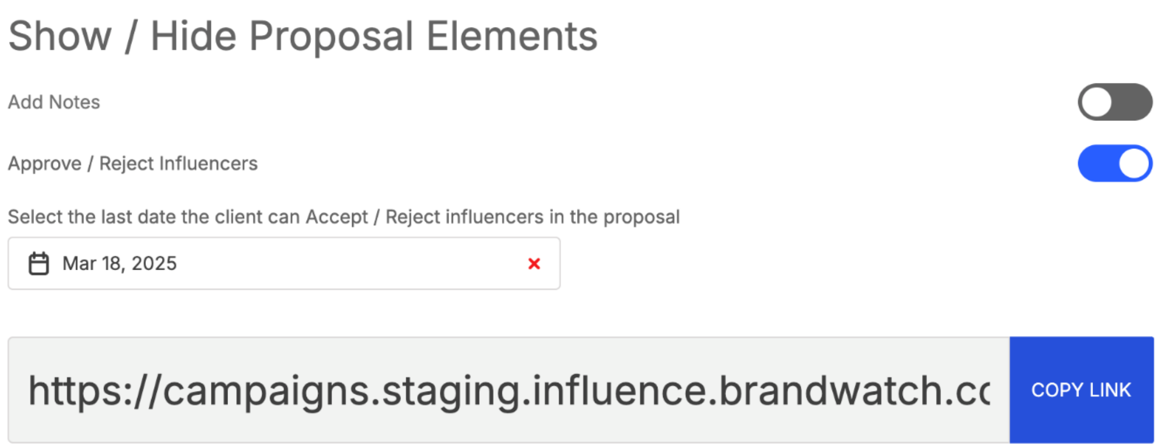


- **Add Notes:** If this is turned on, your client will be able to leave you a note for each influencer in your list. This makes it easy for them to share feedback or ask questions. If a new note is added to an influencer, you'll see a red notification on the **Notes icon** in their profile. You can then reply to your clients' feedback or questions directly in this chat.

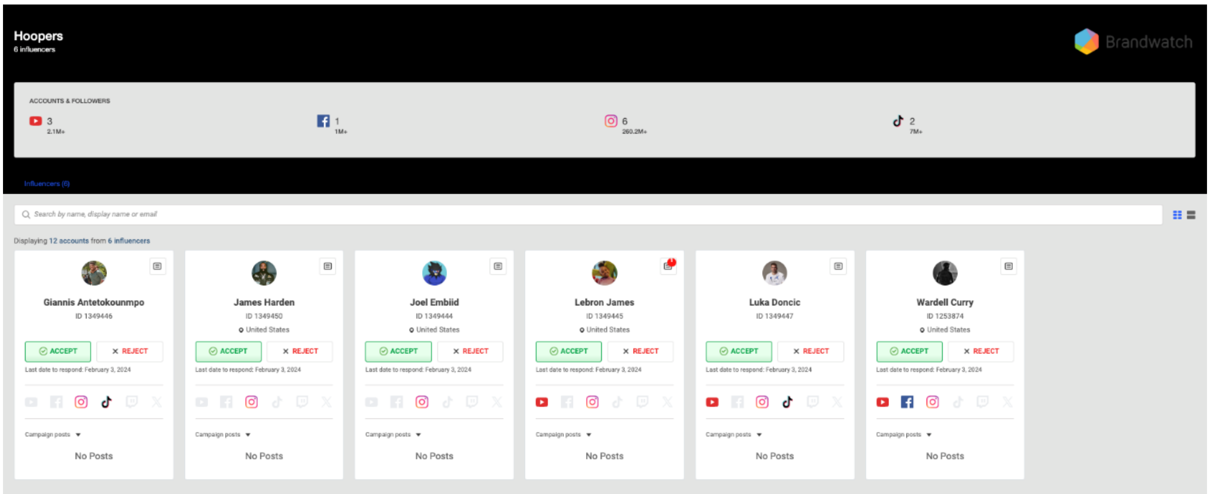


- **Approve/Reject Influencers:** This allows your clients to approve or reject influencers for the campaign in the shared proposal link. You will need to set a due date for this feature, and once this date has passed (or if the influencer moves into the Reached out state or beyond) these actions will be locked.

Toggle on the features you'd like to enable in the shared proposal link, then click **Copy link**. You can then send this link to your client so they can review the proposal, add notes, and/or accept or reject influencers.



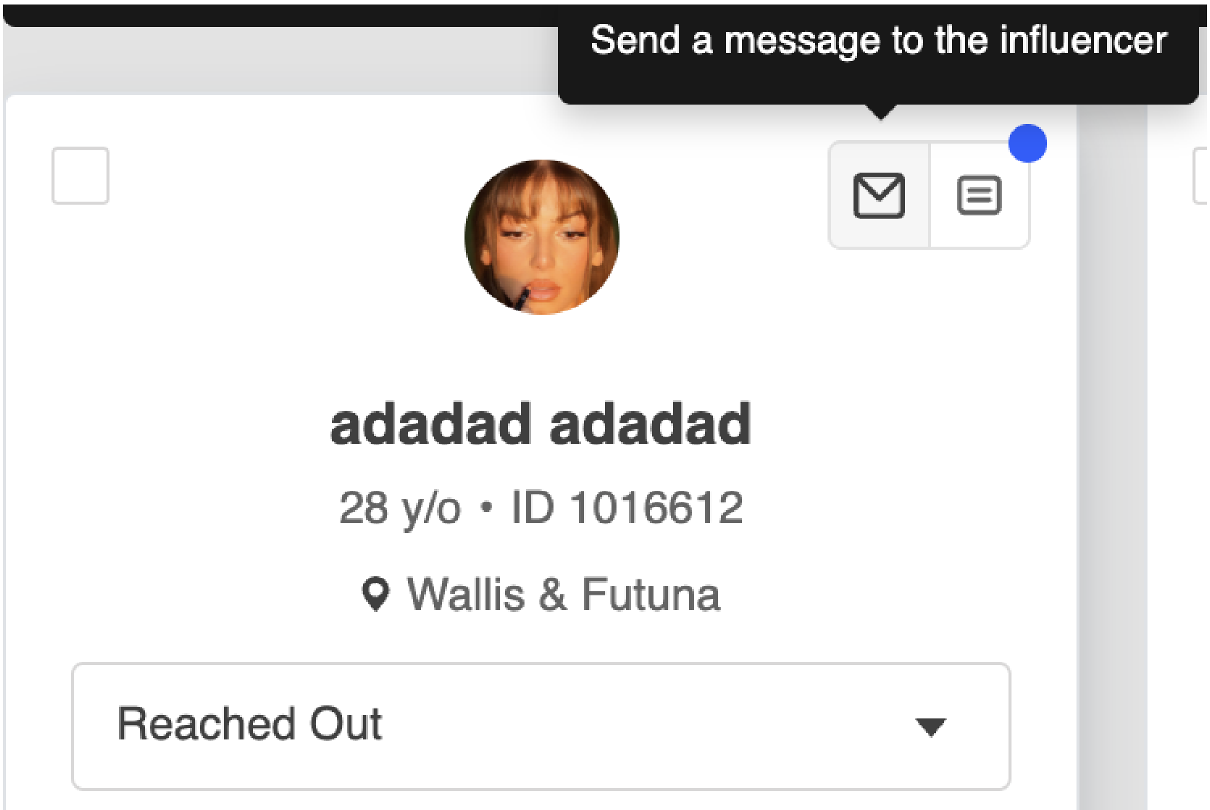
If an influencer is approved, they will automatically move into the **Approved** state in the onboarding flow. If they're not a good fit and the client rejects them, they'll be moved into the **Rejected** state and will not be part of the campaign.



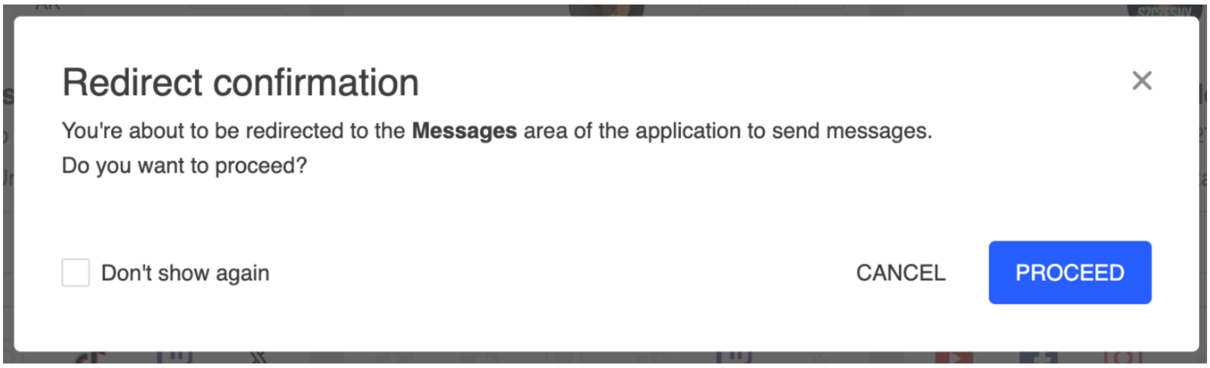
Sending a campaign messages to an influencer

You can send a campaign messages, such as a campaign brief, to any influencer who is in a campaign state of **Approved** or **Reached Out**. The Messages tool allows you to send the influencer information about the new campaign opportunity, such as what your post requirements for the campaign are and what payment you are offering the influencer.

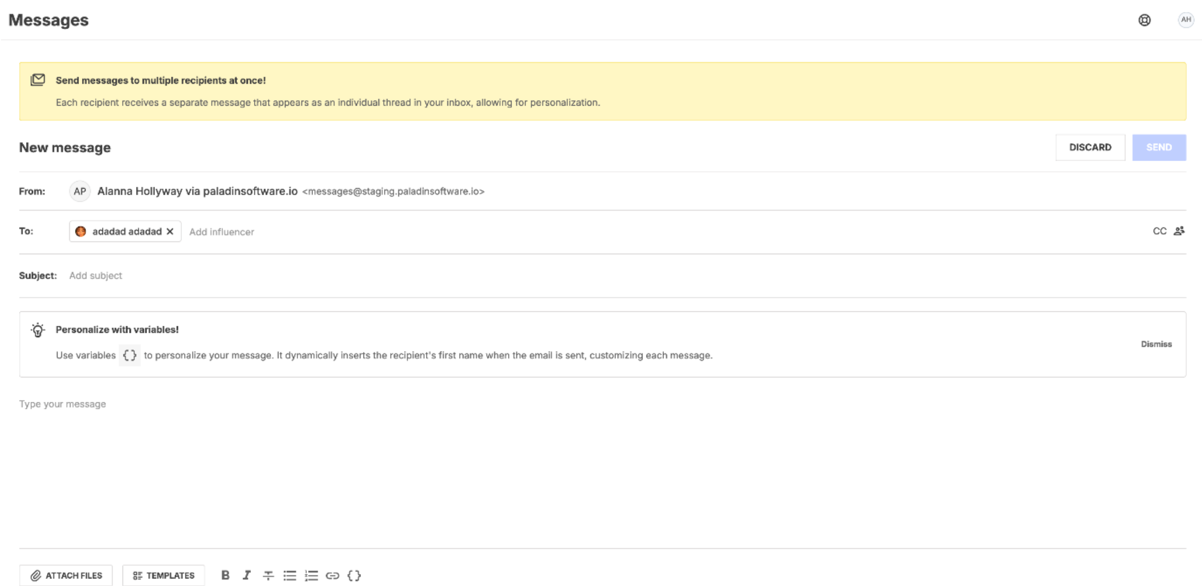
To send a campaign brief message to an influencer, click on the **envelope icon** in the top-right of their influencer card in the campaign to be redirected to the Messages tool. (Visit our article on using the Messages tool for more information about how you can customize your message.)



Send a message to the influencer
adadad adadad
28 y/o • ID 1016612
Wallis & Futuna
Reached Out



Redirect confirmation
You're about to be redirected to the **Messages** area of the application to send messages.
Do you want to proceed?
Don't show again
CANCEL
PROCEED



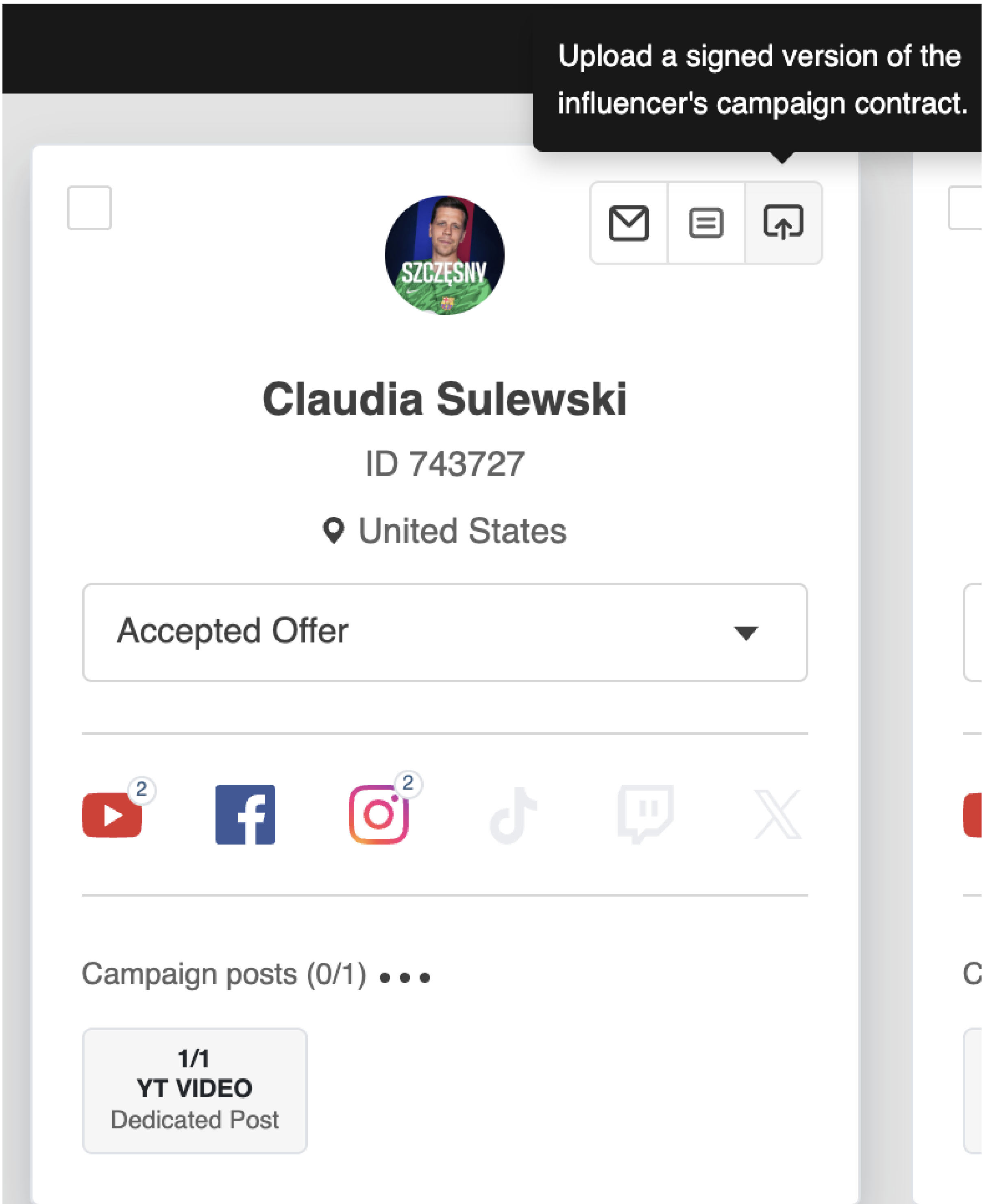
Messages
Send messages to multiple recipients at once!
Each recipient receives a separate message that appears as an individual thread in your inbox, allowing for personalization.
New message
DISCARD
SEND
From:
AP
Alanna Hollyway via paladinsoftware.io <messages@staging.paladinsoftware.io>
To:
adadad adadad
Add influencer
CC
Subject:
Add subject
Personalize with variables!
Use variables {} to personalize your message. It dynamically inserts the recipient's first name when the email is sent, customizing each message.
Dismiss
Type your message
ATTACH FILES
TEMPLATES

The influencer will be able to review the message once received and let you know if they are interested. If the influencer accepts the offer, you can move them into the **Accepted offer** state in the onboarding flow to send them a contract. If the influencer declines the offer, move them into the **Rejected** state.

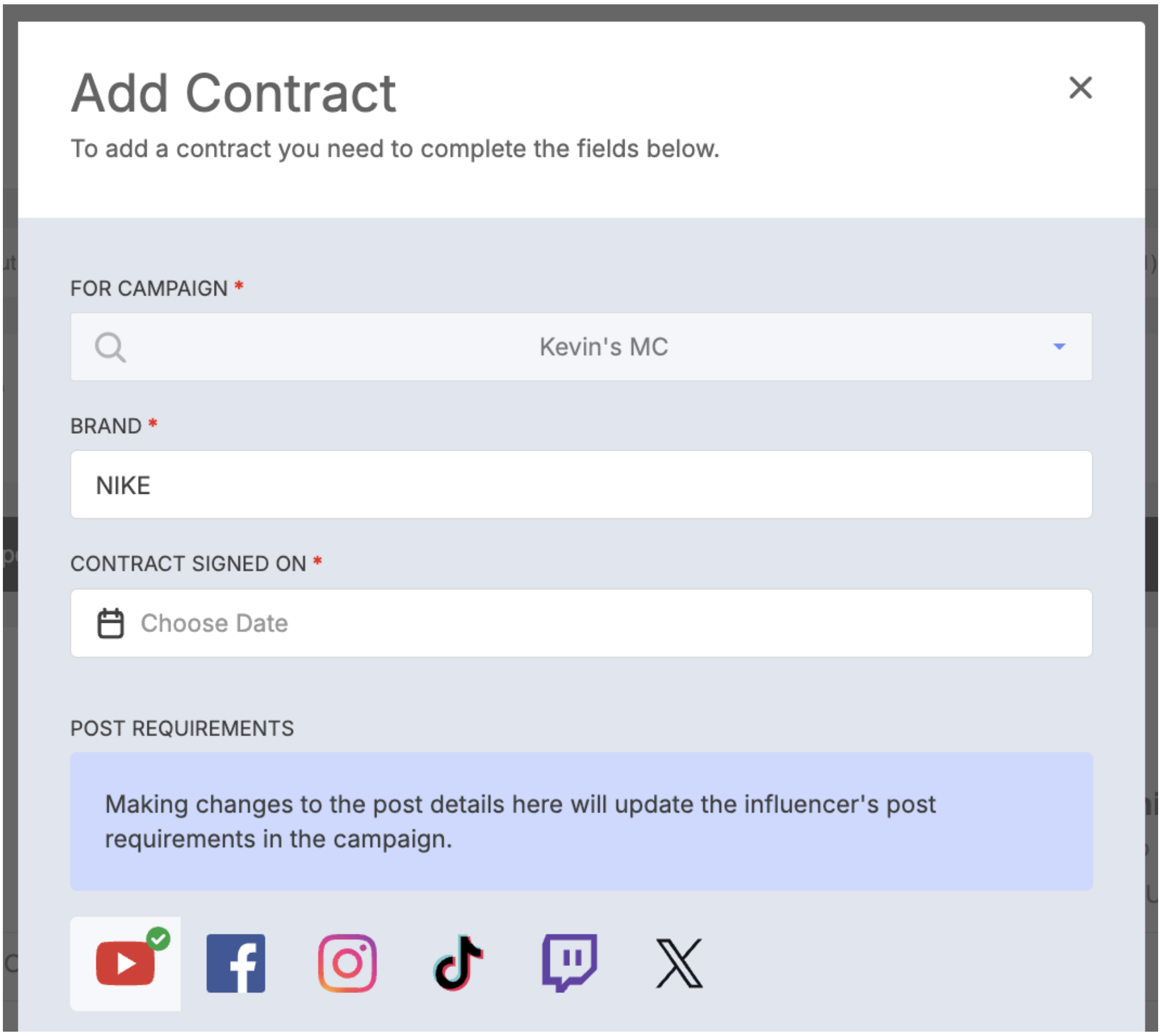
Sending a contract to an influencer

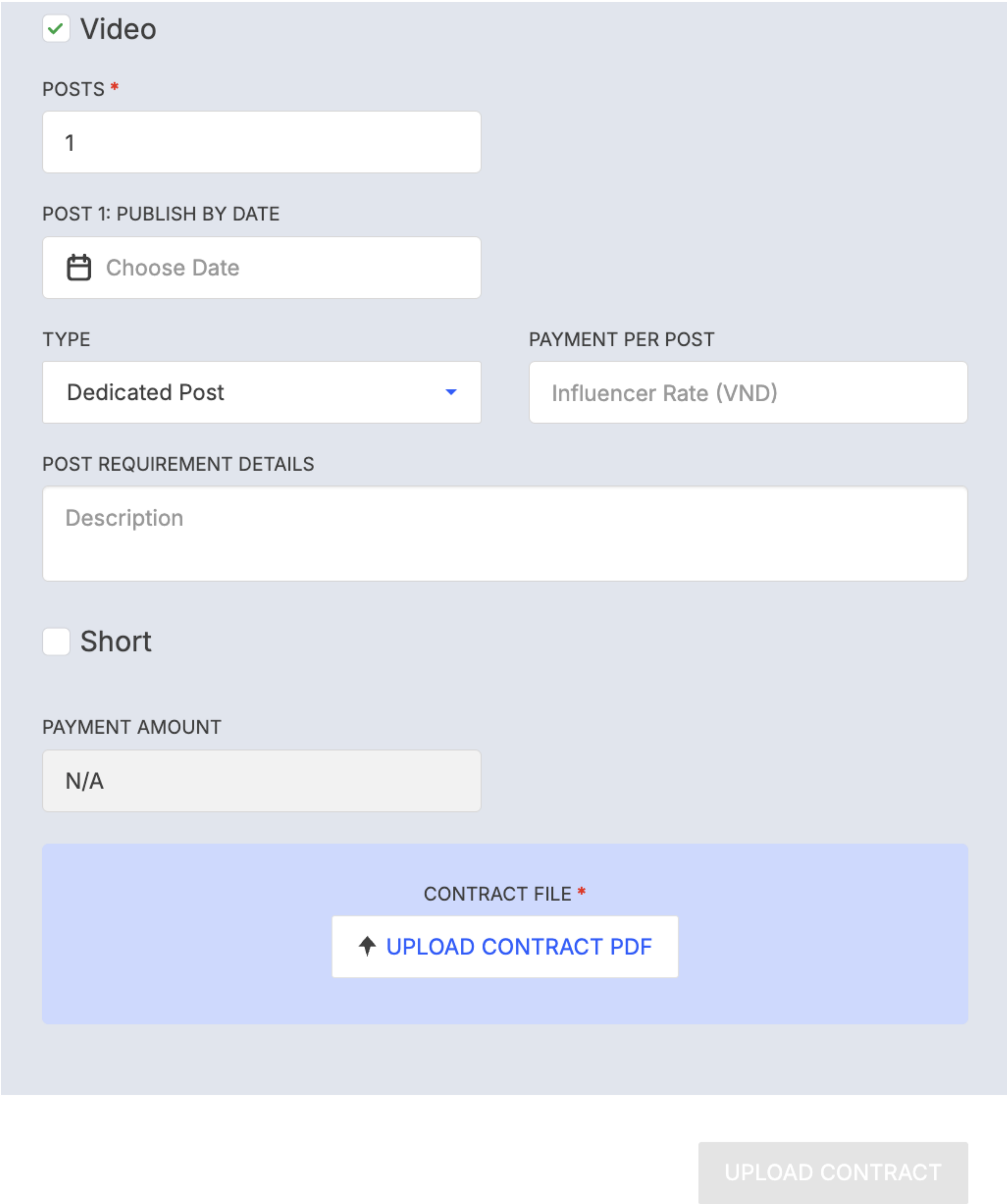
You can send upload a contract to any influencer who is in a campaign state of **Accepted Offer** or **Contract Sent**. This allows you to send the influencer a contract to sign for an upcoming campaign with the terms clearly listed.

To send a contract to an influencer, click on the **upload contract icon** in the top-right of their influencer card in the campaign.



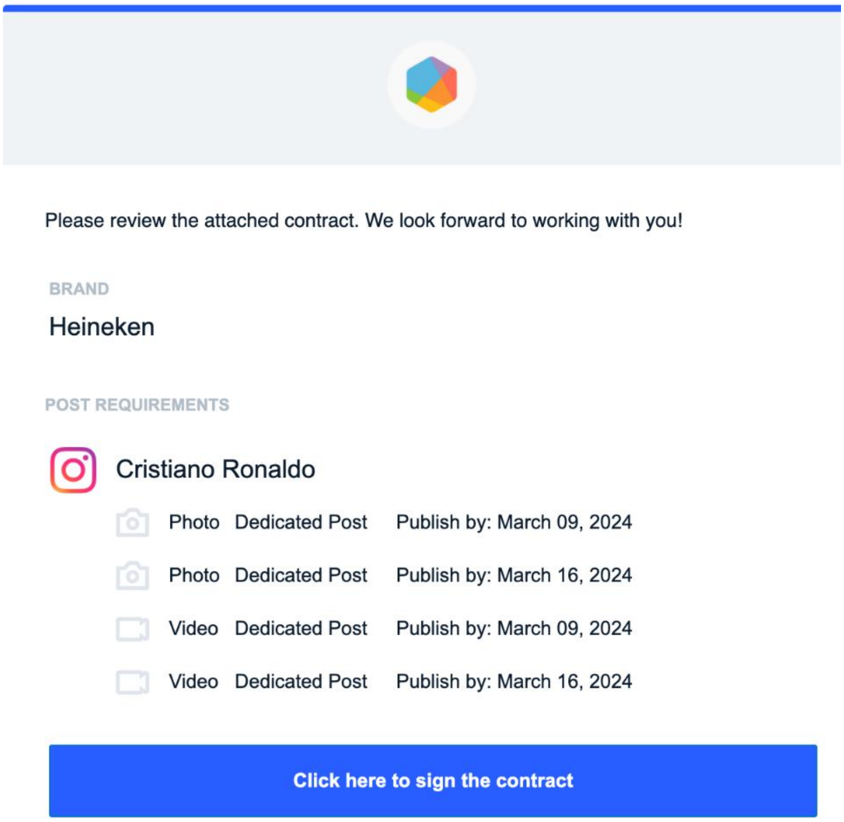
Use the Add Contract window to verify your campaign details and post requirements for the influencer.


Add Contract
To add a contract you need to complete the fields below.
FOR CAMPAIGN *
Kevin's MC
BRAND *
NIKE
CONTRACT SIGNED ON *
Choose Date
POST REQUIREMENTS
Making changes to the post details here will update the influencer's post requirements in the campaign.



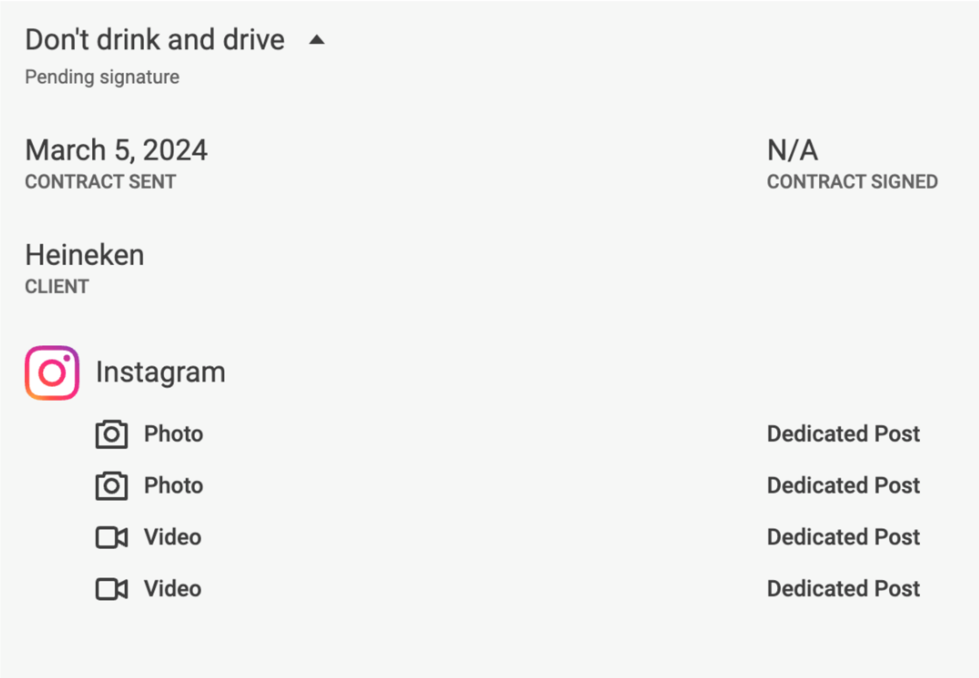
Make sure that the terms and payment amounts provided in the fields are correct and upload a read-only PDF of the contract that you would like the influencer to sign. Click **Upload Contract** when finished.

Below, you'll see an example of what a contract message can look like on the influencer's end. The top bar color and logo of the message are customizable via the **Share Campaign** settings.



The influencer will be able to digitally sign the contract by clicking the **Click here to sign the contract** button at the bottom of their message. Clicking the button will open up a tab in the browser where they can click through the contract file to review it and sign it by providing their personal information. Once the influencer has signed the contract, they will be automatically moved into the **In Campaign** state.

When you have saved and uploaded the contract, it will be visible under the **Contracts** tab in the influencer's profile. The Contracts tab will show a full history of all the campaign contracts that Influence has on file for the influencer.

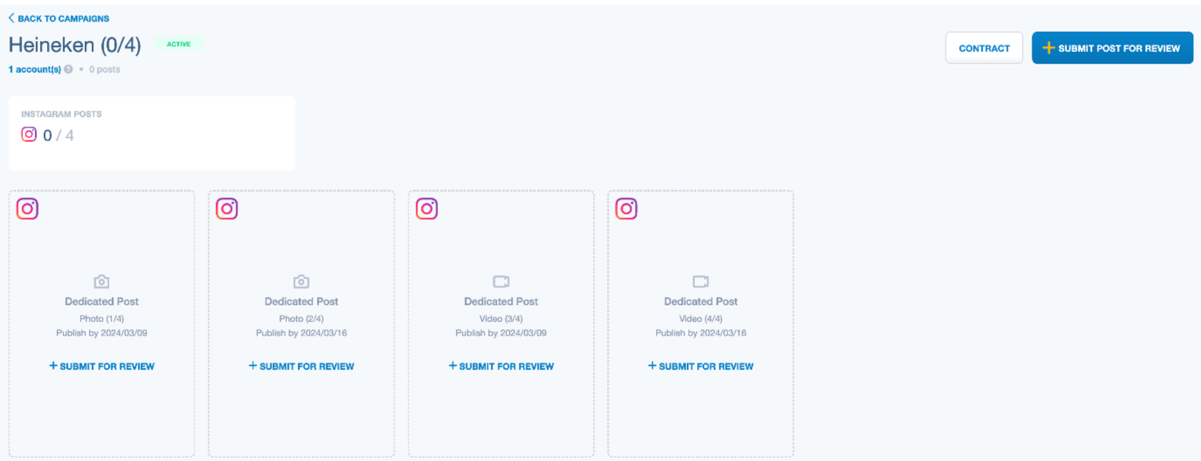


Reviewing influencer campaign posts

Influencers in the **In Campaign** state will be ready to submit their campaign posts to you. Your influencers can submit campaign posts to you for review and approval via their Influence dashboard so you can give them feedback and make sure their content follows the campaign guidelines before it goes live.

Influencer's side

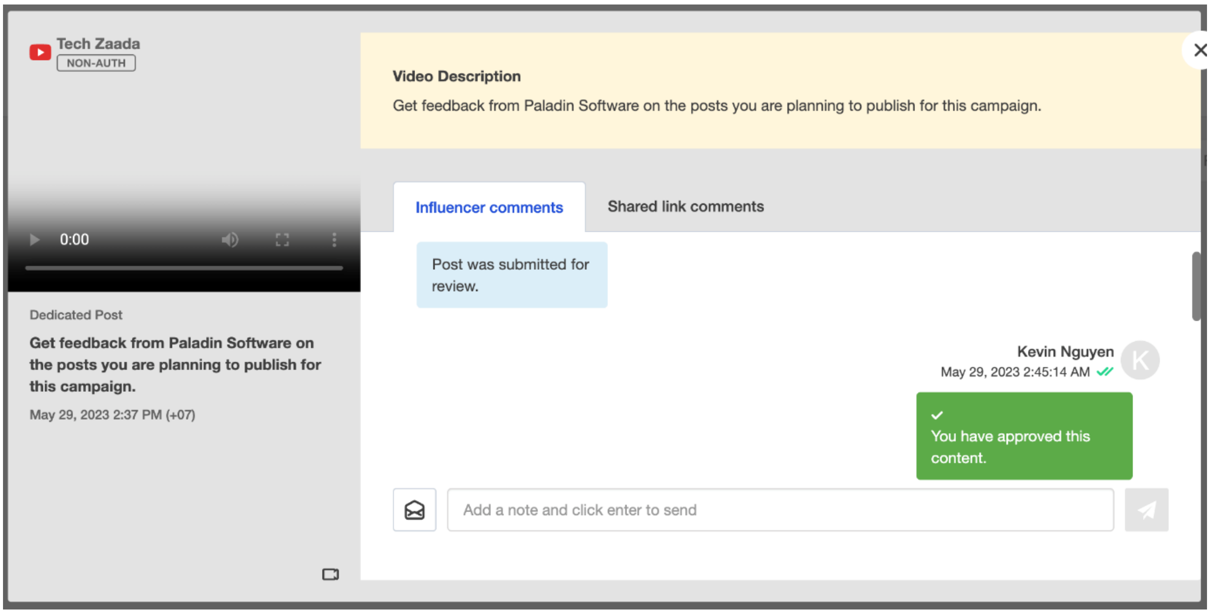
In the **Campaigns** tab of an influencer’s dashboard, they can see the post requirements set for the campaign, along with an option to submit their posts to you for review. If no post requirements have been set, the influencers can use the blue **Submit post for review** button in the top-right corner of the campaign page.



Once the influencer has started the submission process, they'll select the social account they plan to post the content to, the content and post type, and then upload the media file and provide the caption.

When they have submitted the post, the influencer will see it submitted on the campaigns page along with its review status:

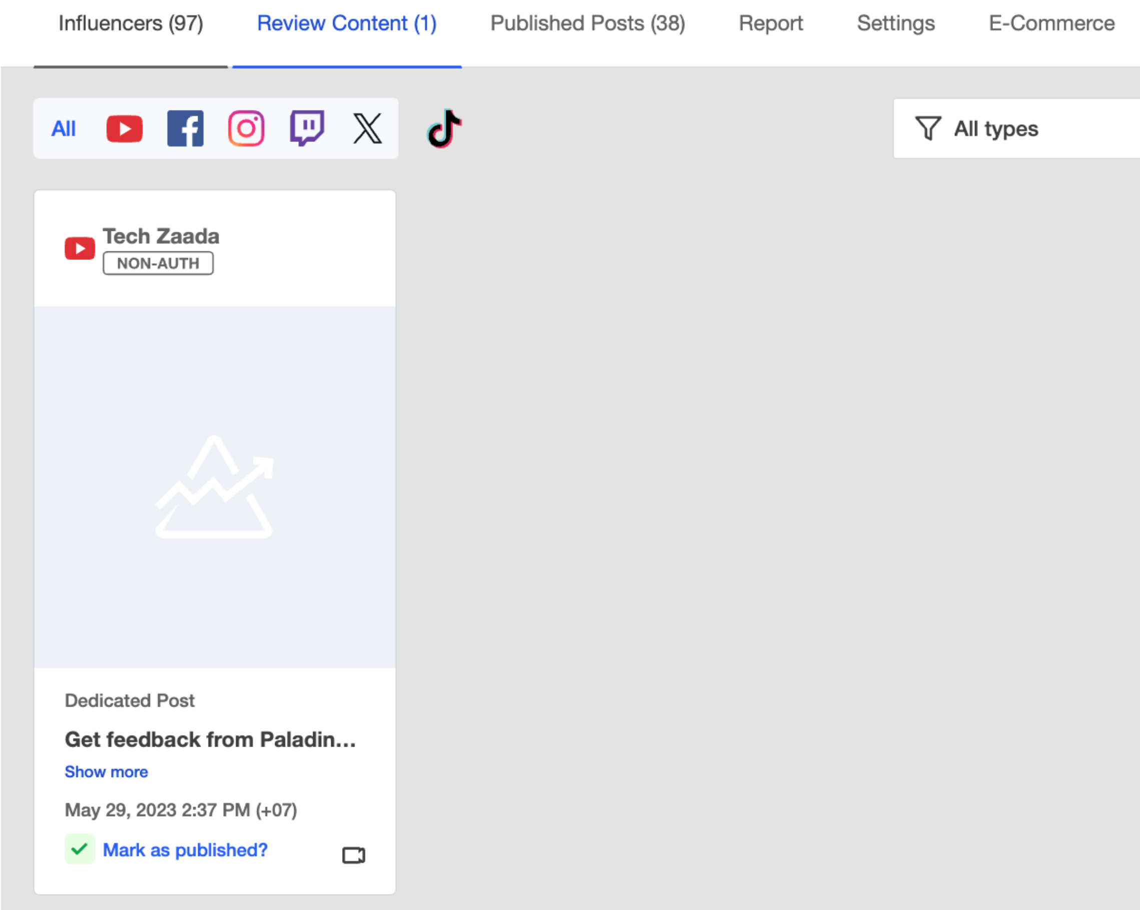
- **Pending:** The influencer has submitted the post to you for review and is awaiting feedback.
- **Changes requested:** You have requested edits for the post.
- **Approved:** You have approved the post and it is ready to be published.
- **Live:** Any published posts that are affiliated with the campaign.



Any comments that you leave on the influencer's submitted content will be visible to the influencer. They can click on the **comment icon** on the post to review the comment and respond. If you need the influencer to adjust the post, the influencer can edit and resubmit the post to you with the requested changes.

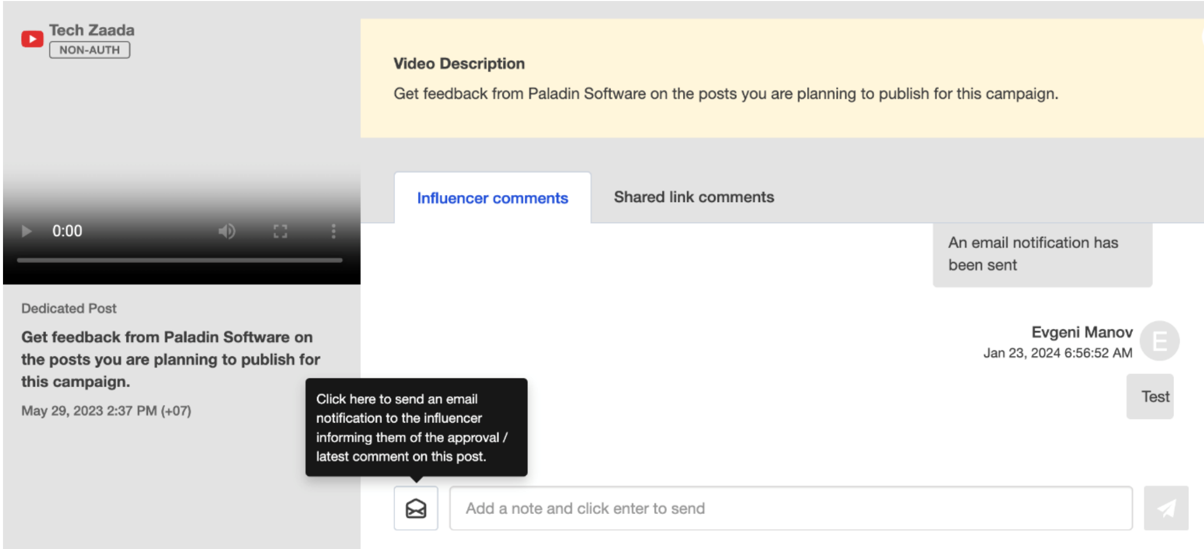
Admin's side

When an influencer submits a post for review, you will receive a notification in your Influence account. You will see all of the submitted posts in the **Review Content** tab of your campaign, and you can filter by the post type, influencer, and review status.



To review the posts and make comments, click on the post in the list. You'll be able to read the full caption, view any media, leave comments to the influencer, and request any changes. The post status will be displayed to the influencer in their Influence dashboard.

If you wish to inform influencers about the latest updates on their submitted post, click on the **envelope icon** to send them an email notification to inform them about the approval or latest comment on their post.



Influence will automatically try to match any approved posts with live posts that have been detected in the campaign. If we find a live post that matches a submitted one, a notification will appear in the **Review Content** tab and you will be able to confirm if it's a match. You can also manually match an approved post with a live post in case the caption used for the live post differs from the caption of the submitted post.

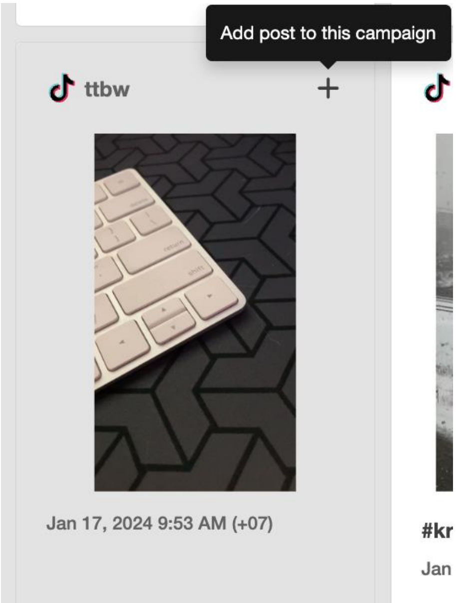
Once a submitted post has been matched with the live post, its status will change to **Published** and it will appear in the **Published Posts** tab in your campaign.

Completing campaigns

When an influencer has published all of the posts that you set as the requirements for the campaign, they'll be moved into the **Posts Fulfilled** state in the campaign onboarding flow and they will be ready to be paid.

You can review any live posts for your campaign under the **Published Posts** tab. You can filter by platform, influencer, and date posted, and also sort by publishing date, views, or engagements. You also have the option to filter to see all of the posts made by an influencer within a selected date range, including posts that are currently not being tracked. This is helpful in case influencers forgot to use your campaign keywords in their post metadata.

If you see a post that should be included in the campaign but isn't, click on the **blue + sign** in the top-right corner of a post to add it.



While Influence cannot automatically track campaign payments going out to the influencers, you have the option of manually moving influencers into **Paid** state to keep track of which influencers you have paid in the campaign.

Tip:

Once a campaign reaches the end date in the date range you have set for the campaign, the campaign will automatically be marked with the **Completed** status in your campaigns list.

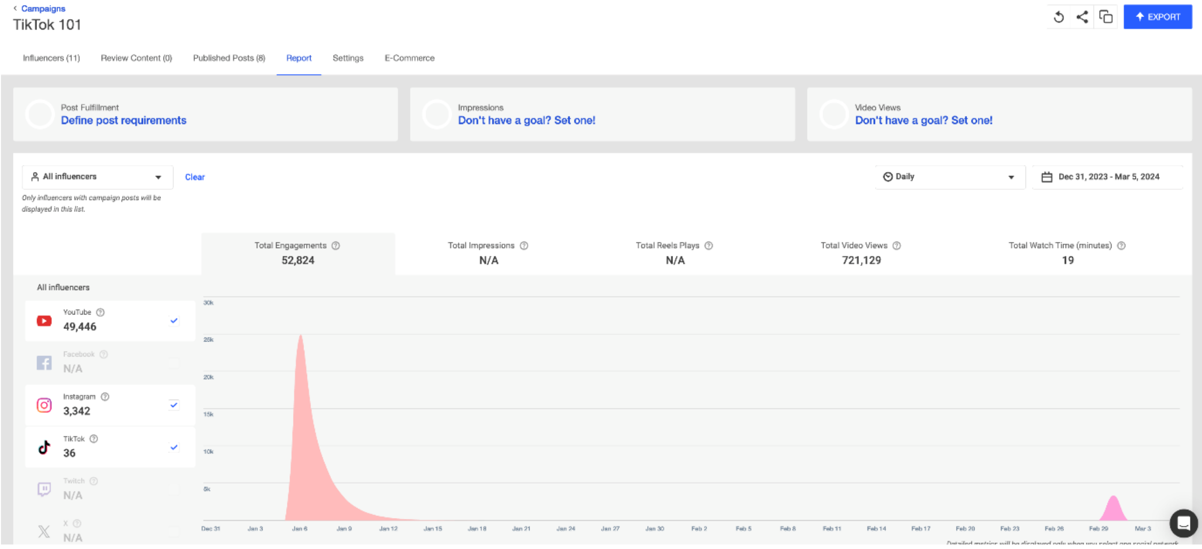
Reporting on campaigns

Whether your campaign is currently active or has been completed, you can track your campaign's performance under the **Report** tab. The report offers a variety of metrics, including top-down metrics for your campaign as a whole and sorting options for more detailed metrics by influencer, social network, and date range.

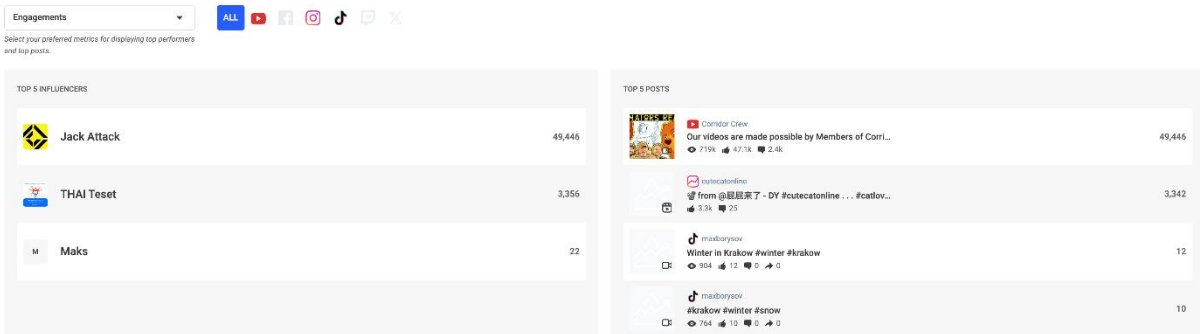
Tip:

Visit our article on Data and Metrics in Influencers and Campaigns for a full list of available campaign metrics.

In the top left of the main report graph, you can use the **Influencers** drop-down menu to compare the performance of two influencers in your graph. After you select two influencers, you will see the comparison of their performance in the graph. You can further filter the data by adjusting the selected social networks and date range. If only one social network is selected, a detailed breakdown of the influencers' performance on that network will be displayed under the graph.



Below the campaign graph, you will see performance rankings of the top five influencers and top five posts in your campaign. You can sort the rankings by the metric (e.g. Engagements) and social network of your choice.



Tip:

At any time, you can [export or share a live link of your report](#) for your organization's stakeholders.