How to – Create and send branded email marketing campaigns

Contents

1. Introduction

Branded emails are used as part of AECOM’s digital marketing and communications mix. Up to now, email marketing within AECOM has often involved using easily-accessible tools such as Microsoft Word/Outlook, or commercial online email marketing software such as iContact or MailChimp. Previously, there has not been a single tool which is available to everyone globally.

In terms of email recipients, Salesforce – AECOM’s global Customer Relationship Management (CRM) system – should be the central location for all client/prospective client details across the business in all regions except ANZ. However, whilst a massive amount of contact data is already stored on Salesforce, there is still a substantial amount of data stored in colleagues’ Outlook contacts lists and on spreadsheets. Additionally, a lot of the information on Salesforce is out-of-date and incorrect.

To help address these issues, AECOM has chosen to set up a global account with iContact – a premier online email marketing tool – which together with Salesforce will provide a platform for managing all email communications globally, and which encourages clean data to be maintained within Salesforce.

Salesforce and iContact

Salesforce already has a strong relationship with iContact and the two products have close integration. The use of Salesforce and iContact together will enable the business to:

1) Create branded emails using iContact’s easy-to-use MessageBuilder
2) Use Salesforce campaigns to send emails directly to campaign members, powered by iContact

There are some key benefits of using this combined approach with Salesforce/iContact:

1) Visual feedback is available on the success of each Salesforce campaign, down to the level of individual recipients
2) The visibility of bounce-backs in Salesforce gives an opportunity to update relevant contact records
3) Over time, we will build up a clear picture of what we are sending to our clients, prospective clients, graduates etc – and how successful our campaigns are.

All of these benefits will give us the opportunity to manage our email marketing activities with much more accuracy.

To help you understand how iContact works with Salesforce, this How To guide has been created to explain how to add clients to a Salesforce campaign, as well as how to create an email, and send it from Salesforce.

2. Creating your HTML email

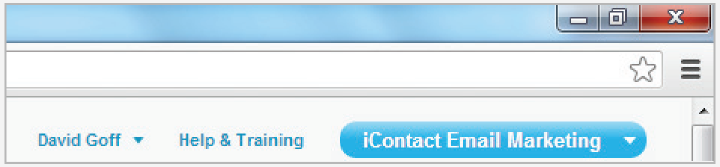
2.1 Accessing the iContact MessageBuilder

HTML emails can be produced using various means, including Microsoft Word. If you are confident with HTML and already use products such as Dreamweaver to produce your emails, you can continue to do this. However, tools such as Microsoft Word should be avoided if possible, as they can create a lot of unnecessary code which is difficult to modify, and images can get saved in temporary folders.

Another option is to use iContact's MessageBuilder in Salesforce.

STEP 1 – Locate the new MessageBuilder in Salesforce

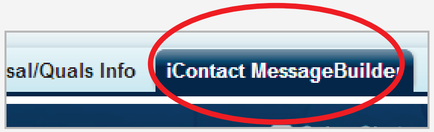
In the top right hand corner of Salesforce, select 'iContact Email Marketing as an option in the Application Menu. The main Salesforce tabs on your screen will change and 'iContact MessageBuilder' will appear as an option on the main tabs of Salesforce.



STEP 2 – Access the MessageBuilder

Click on the 'iContact Message Builder' tab, and login to the Message Builder using the following details:

Username: aecommb / **Password:** aecom123



2.2 Creating emails using MessageBuilder

Before you create your email, make sure you are familiar with AECOM's Style Guidelines for the use of colours, fonts etc. The design of your email can fit with your campaign themes, but please ensure it is fully brand and style compliant. If in doubt, ask your local design team to review it. You can then use MessageBuilder to create your email.

STEP 1 – Set up your new email

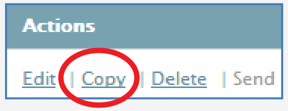
OPTION 1 - Create an email using the 'MessageCoder'

You can use the 'MessageCoder' to set up an email from scratch using the simple editor (or by entering HTML code). Click on the 'Use MessageCoder' icon to create a new template and start building your email. At this point, you can paste in some text to start, or even paste an email that you have saved somewhere else.

OPTION 2 - Create an email using an AECOM template

Alternatively, you can copy and customise a pre-designed AECOM template. Scroll down to the list of previous AECOM emails and select 'AECOM templates' from the 'Narrow results by campaign' dropdown:

Then locate the template you want to use, and click 'Copy'



NOTE: Please do not click on the 'Use MessageBuilder' icon, as this forces you to choose from a number of pre-built templates – none of which are AECOM brand compliant

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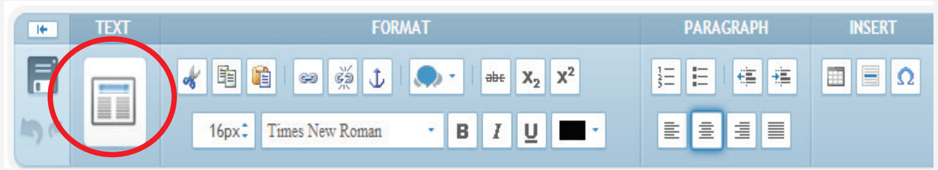
STEP 2 – Build your email content

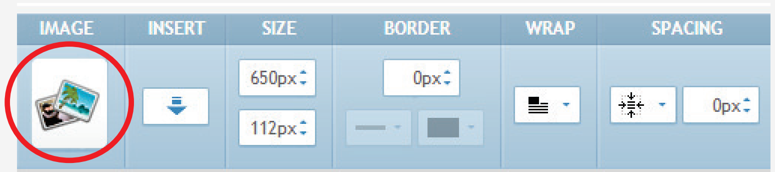
In the main component of the email editor you edit your content in a What You See Is What You Get (WYSIWYG) editor. Click on the 'TEXT' icon for a range of familiar icons including: *cut, copy, paste, insert hyperlink, set font, font-size, bold, italic, underline, font colour*. You can also set paragraph alignments and bulleted/numbered lists, as well as insert tables.



Use tables to structure your emails: You can insert a table to create the main structure of your emails. To edit the table as you go along, right click on a table cell in your design, and use the menu to insert or delete columns and rows, or to merge or split cells.

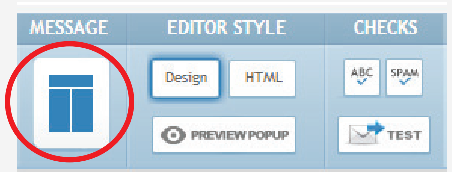
STEP 3 – Upload images and insert them into your email

In the MessageBuilder there is an image library, which can be accessed externally. This is where any images on the email should be stored. Click on the 'IMAGE' icon, and then select 'INSERT' to add a new image. When you click on any existing images within your email, the size, border and positioning of the image will be displayed in the IMAGE area on the right.



STEP 4 – Access the HTML code to use in Salesforce

Once you are happy with the content of your email and it is ready to use, click on the 'MESSAGE' icon. By default, this shows the 'Design' view of your email, so you should click on the 'HTML' button to display the HTML code. This will now need to be pasted into a Salesforce template so that it can be used in your campaign.

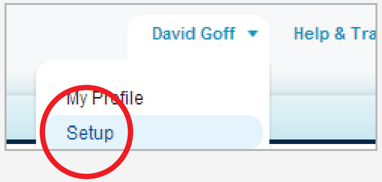


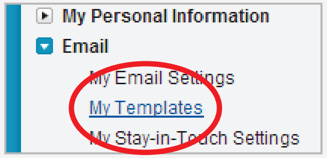
2.3 Copying your email into a Salesforce template

Before you can send out your campaign in Salesforce, you need to create a template which contains the HTML that you have created. Please follow the following simple steps to set up your Salesforce template:

STEP 1 – Access the email templates page on Salesforce

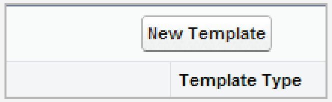
In the top right hand corner of Salesforce, where your name is displayed, click on your name and select ‘Setup’. Click on the ‘Email’ link on the left-hand sidebar and then click on ‘My Templates’ from the options that appear.



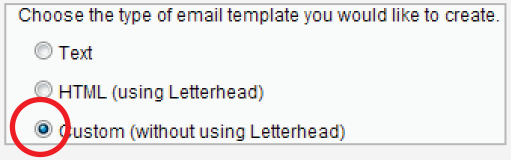


STEP 3 – Create a new template

Click on the ‘New Template’ button to add a new template.



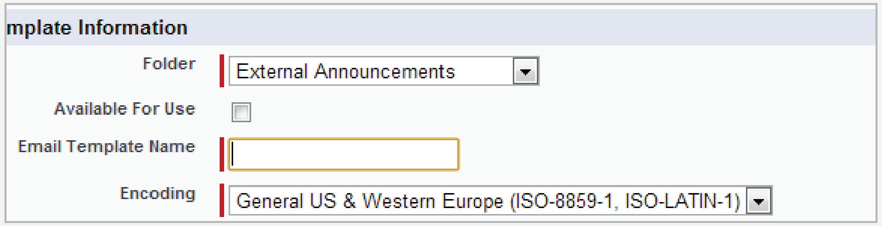
Then select ‘Custom (without using Letterhead)’



STEP 4 – Enter the core information for the template

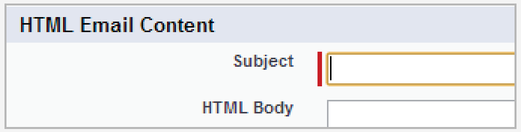
Select the folder where the template should reside, and then give the template a name. If possible, try to use a logical naming convention which incorporates the business or practice line, and the geography or region – eg *EMEA – PCC – Summer Event Invite*

When you have filled out the relevant fields, click ‘Next’ and continue to step 5.



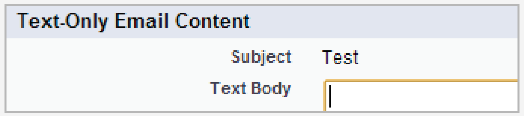
STEP 5 – Paste your HTML into the template

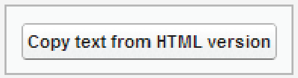
Give the email a subject line, and then paste your HTML from MessageBuilder in to the HTML Body field. Click ‘Next’ and continue to step 6.



STEP 6 – Use the HTML to create a text-only version

Click on the ‘Copy text from HTML version’ button. A text version will be created from your HTML code. Once you have done this, click ‘Save’ to complete and save your template.





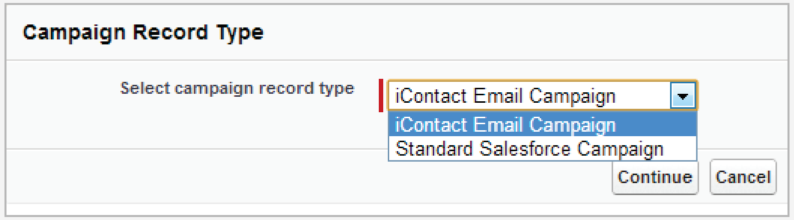
3. Sending your HTML email

3.1 Creating an iContact campaign in Salesforce

If a campaign doesn't already exist for you to use in sending your email, you will need to create one, as follows:

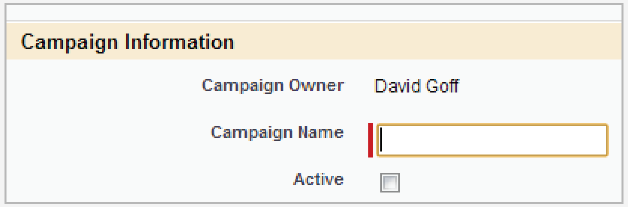
STEP 1 – Create a new Campaign item

Click on the 'Campaigns' tab on the topbar, and click the 'New' button. You will be offered two types of campaign to create – an iContact Email Campaign and a Standard Salesforce Campaign. Click on 'iContact Email Campaign' and click 'Continue'.



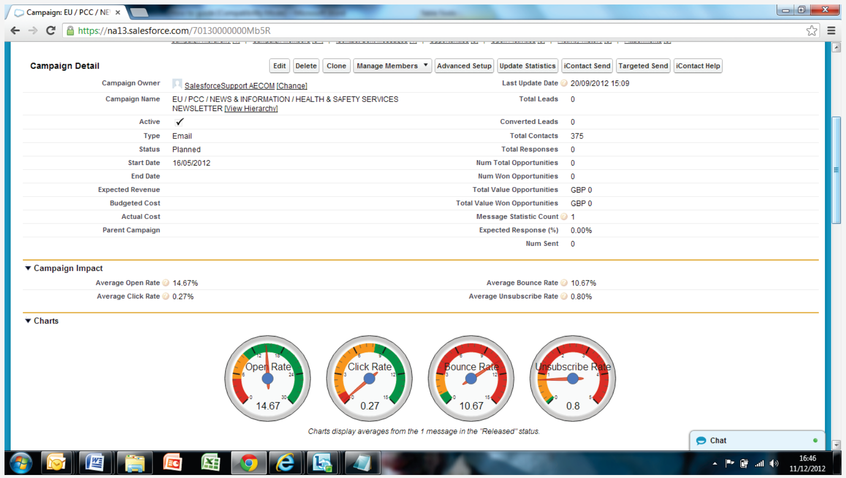
STEP 2 – Fill out the core Campaign information

Complete the core fields including the Campaign Name, the Type and the Status. Optional fields include Campaign Start and End Dates and any Success Criteria. Save the campaign.



STEP 3 – Fill out any additional information

Review the campaign fields and complete any fields that you want to use to help define your campaign.

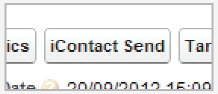


3.2 Sending your email using your iContact campaign in Salesforce

Once you have created a template in Salesforce to host your branded email, you can send it out through your Salesforce iContact campaign. Find your existing campaign on Salesforce, by searching for it, or looking in your recently viewed campaigns, and then do the following:

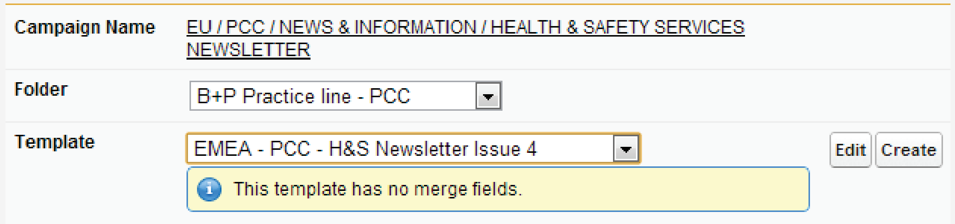
STEP 1 - Open the campaign

Open your campaign in Salesforce and check it includes all of the contacts that you want to send your email to. Click on the 'iContact Send' button from the top row of buttons.

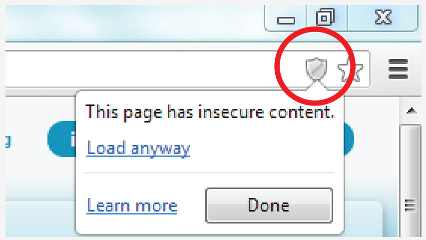


STEP 2 – Load in your email template

Select the folder where you stored your template from the dropdown list. Provided you have stored your template in that folder, your template will appear in the template dropdown. Select it.

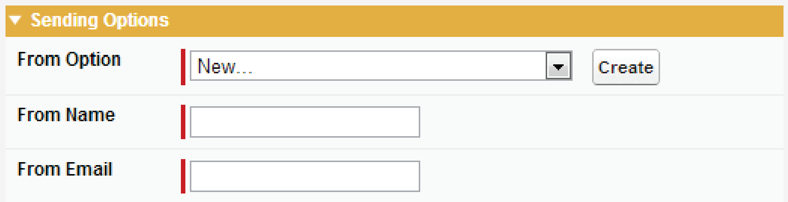


You should then be able to scroll down the page and see a preview of both your HTML and your text versions. If you don't see the HTML version, it will be because Google Chrome hasn't loaded in a small plugin required to view the HTML version. Click on the little Shield icon at the top right of the page, and click 'Load anyway'. Then select your template again.



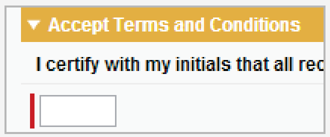
STEP 3 – Enter the 'From' address

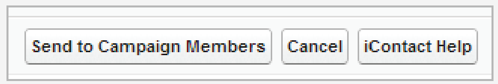
Select a 'From' address using the 'From Option' dropdown, and the information will be populated in the relevant fields. If the 'From' address that you want is not listed in the dropdown, enter your own information to all of the relevant fields, and then click on the 'Create' button next to the 'From Option' field.



STEP 4 – Certify that you are the sender and send the email

iContact requires that you add your initials to confirm that the email is not spam. Once you've followed all of the steps above, click on 'Send to Campaign Members' at the bottom of the screen to issue your email. You may be asked for a further confirmation, which you can click through.



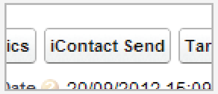


3.3 Using your campaign to send multiple emails

Your iContact campaign doesn't just have to be used to send one branded email. It can be used multiple times for ongoing emails, such as periodic bulletins, or themed marcomms campaigns. Simply follow the process below each time you want to send an email using the campaign:

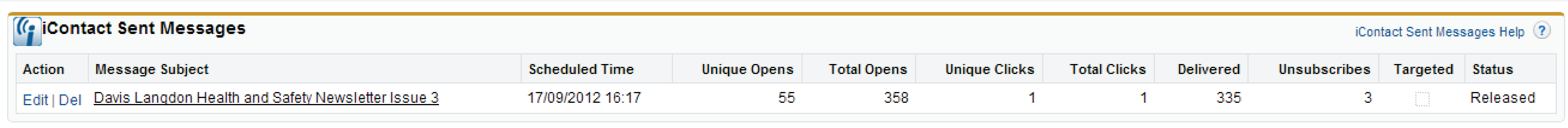
STEP 1 – Open your existing campaign

Open your campaign in Salesforce and double-check that it includes all of the contacts that you want to send your email to. Click on the 'iContact Send' button from the top row of buttons.



STEP 2 – Load the new email and send it

To send a new email using your existing campaign, follow the instructions described in *3.2 Sending your email using your iContact campaign in Salesforce*. Select your new email template and follow the rest of the instructions. Once you have sent more than one email, you can view access the delivery details for each of your emails via the 'iContact Sent Messages' section in the main screen of the campaign.



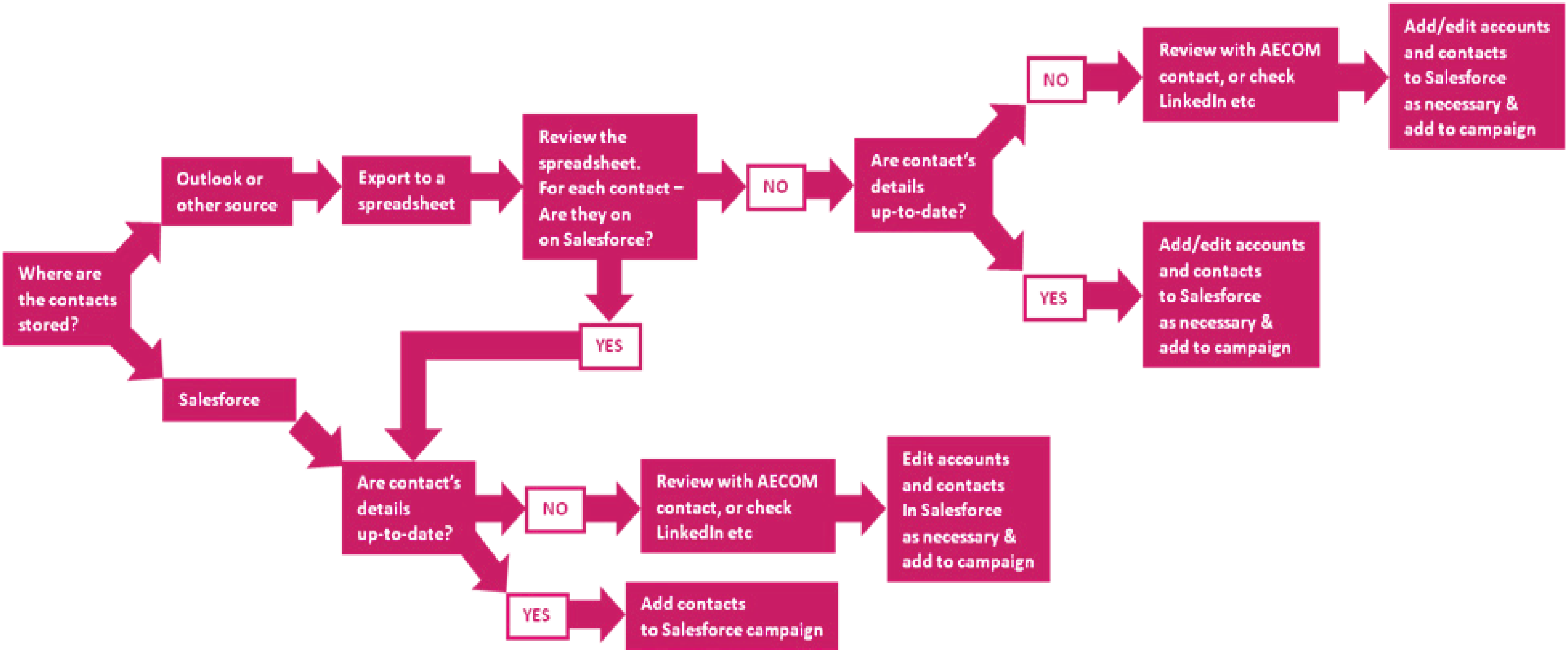
iContact Sent Messages

iContact Sent Messages Help

Action	Message Subject	Scheduled Time	Unique Opens	Total Opens	Unique Clicks	Total Clicks	Delivered	Unsubscribes	Targeted	Status
Edit | Del	Davis Langdon Health and Safety Newsletter Issue 3	17/09/2012 16:17	55	358	1	1	335	3		Released

4. Managing the contacts for your campaign

To fully utilise your campaign, you need to ensure that your list of contacts are all in Salesforce. Many or most of them may already be in Salesforce – or they might be stored on colleagues' Outlook lists, or in some other sources. Wherever the contact data resides, the goal is to review all the data to ensure as much as possible that the contact details are still correct, then to work through the data and get it onto Salesforce – ensuring that duplicate records do not get entered into Salesforce. All new and existing contacts in Salesforce should be added to your iContact/Salesforce campaign. Use the process below as a starting point for getting the contacts into your campaign:

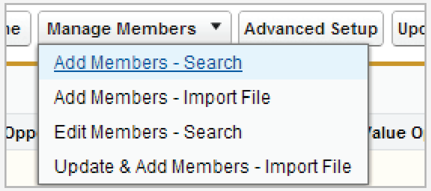


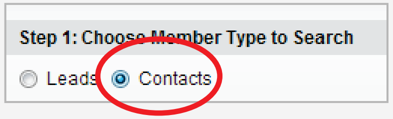
5. Adding existing Salesforce contacts to your iContact campaign

To search for individual contacts and add them to your campaign, do the following:

STEP 1 – Set up a search for contacts in Salesforce

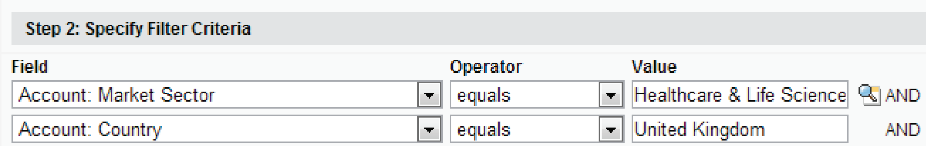
Scroll down in your campaign and find the 'Campaign Members' section. Click on the 'Manage Members' button, and select 'Add Members – Search'. Then ensure that you have selected 'Contacts' rather than 'Leads'.





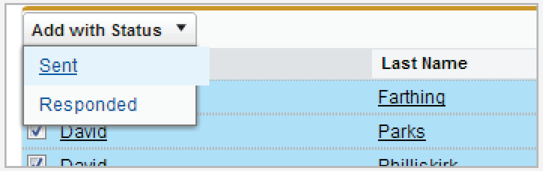
STEP 2 – Define some filters for your search

Decide whether you are going to search for people individually (use 'First Name' and 'Last Name'), or use other criteria such as 'Account: Market Sector' and 'Account: Country' to find multiple contacts.



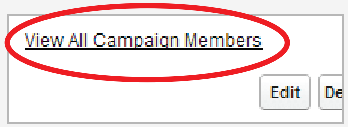
STEP 3 – Select the contacts to include in your campaign

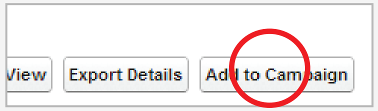
Tick the checkboxes next to all the contacts you want to include in the campaign and then click on the 'Add with Status' button. Select the 'Sent' option.



STEP 4 [OPTIONAL] – Add contacts from another existing campaign

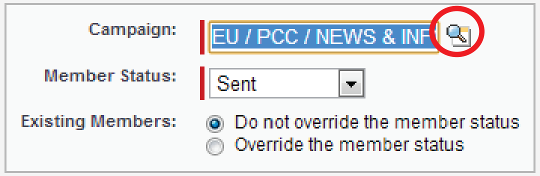
If you want to add all the contacts from an existing campaign into your new campaign, you should first search for the existing campaign, and open it. Click on 'View All Campaign Members', then when a new window opens, click on the 'Add to Campaign' button.





Select your new campaign and add the contacts

Use the magnifying glass tool to search for your new campaign, and then add all the contacts with a Member Status of 'Sent'. Do not change the 'Existing Members' button.

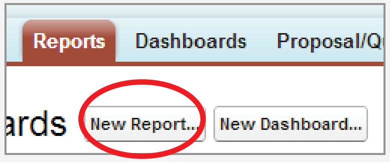


6. Importing contacts from multiple existing campaigns

There may be a number of contacts on Salesforce – who may or may not be members of other Salesforce campaigns – that you would like to add to your campaign. If you can export details of these from Salesforce and collate them on a spreadsheet, then it is possible to add them to your new iContact/Salesforce campaign as a batch. You can do this as follows:

STEP 1 – Create a report

Click on the 'Reports' tab and then 'New Report'. Add some filters to find contacts which you might want to add to your campaign. Common options are 1) A 'Who knows who' report - filtered by one or more colleagues who are in the contact's 'AECOM Team', and 2) A market sector report – filtered by the client's market sector grouping.

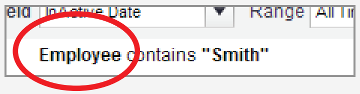


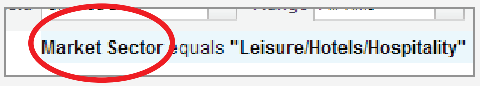
Report type for reporting by colleagues & 'who knows who': *Other Reports' > 'AECOM Team with Contacts'*
Report type for reporting by Client's market sector grouping: *'Accounts & Contacts' > 'Contacts & Accounts'*

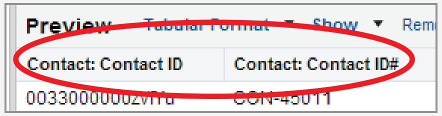
STEP 2 – Add some filters and fields to get a list of contacts

Depending on the type of report you have created, add the appropriate filters to extract a list of contacts for your campaign.

In the report output, ensure you have included the 'Contact ID' and 'Contact ID#' fields as columns.





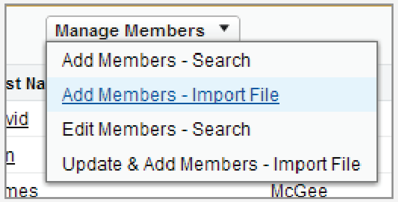


STEP 3 – Export your report from Salesforce

Once you have completed your report design, save it, run it and export it to Excel.

STEP 4 – Associate the contacts with your campaign

In your new campaign, scroll down to the 'Campaign Members' section, then click on 'Manage Members' button and select 'Add Members – Import file'. A new window will open containing the Import Wizard. Click the 'Update and Add Campaign Members' button and follow on-screen instructions. The contacts will be added to your campaign.



NOTE: This process will only add the contacts to the campaign – it will not duplicate the contact record.

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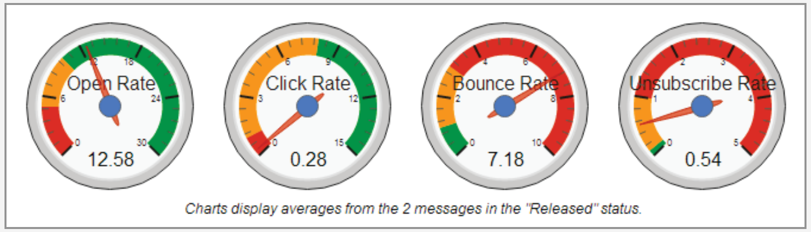
7. Analysing the success of your campaign

After your campaign has been released and sent to your members, you can view statistics on the performance of the campaign. Basic statistics are displayed within your campaign, or you can create a dashboard for a more detailed view. Below shows the information that is available within your campaign:

STEP 1 – View performance for the campaign as a whole

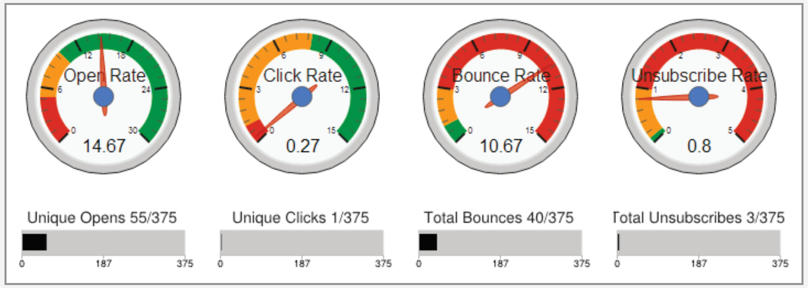
To see a snapshot of the performance of your campaign as a whole, scroll down the page on your campaign. The main set of dials shows you the open rate as a percentage of emails delivered, plus the click rate for any hyperlinks, the bounce rate and the unsubscribe rate (all messages are sent with an unsubscribe option). Scroll down to the 'iContact Sent Messages' section to see a more detailed summary for each email in your campaign.



Unique Opens	Total Opens	Unique Clicks	Total Clicks	Delivered	Unsubscribes
37	104	1	1	340	1
55	358	1	1	335	3

STEP 2 – View more details about your sent email

Within the 'iContact Sent Messages' section, click on the hyperlink for the email you sent (you may have sent multiple emails from your campaign). This will take you to more detail on your individual campaign. You will see that the dials now show the open/click/bounce/unsubscribe rates for your individual email, along with the specific numbers involved.



STEP 3 – View details of individual campaign members

Scroll down to the 'iContact Message Statistic' section for details on each of your recipients. To view all of your recipients, use the 'Go to list (50+)' hyperlink at the bottom of the list. You can easily sort the list by any column, which enables you to quickly see who has unsubscribed or bounced – helping you to manage your data cleansing. Clicking on an individual recipient will take you to their page on Salesforce, where you can view details of all the campaigns they have been sent.

iContact Message Statistic

Action	Recipient Name	Total Opens	Last Opened	Total Clicks
Edit | Del	Gary Humphreys	0		0
Edit | Del	Graham Blake	0		0
Edit | Del	Noel Byrne	0		0
Edit | Del	Simon Carter	0		0
Edit | Del	Jason Clark	0		0

Show 5 more » | Go to list (50+) »