CAMPAIGN BUILDER*

Overview

Campaign Builder resides under Campaign and is a *required* component when creating campaigns. As the name implies, Campaign Builder is where campaigns are built. This module is the core of Marketing Director and acts as the starting point. All campaigns start here and, as necessary, the user branches out to other modules to create additional components. Campaign Builder allows you to associate campaign components, campaign attributes, and campaign costs. Once the campaign is complete, you must schedule it for execution.

Campaign Components

Below are the required components needed to build a campaign. To create a campaign, follow the order on the Campaign Builder screen (which is the same as below). You will need a treatment, a segment, and a delivery channel/extract template. Finally, the campaign must be validated, approved and scheduled for execution.

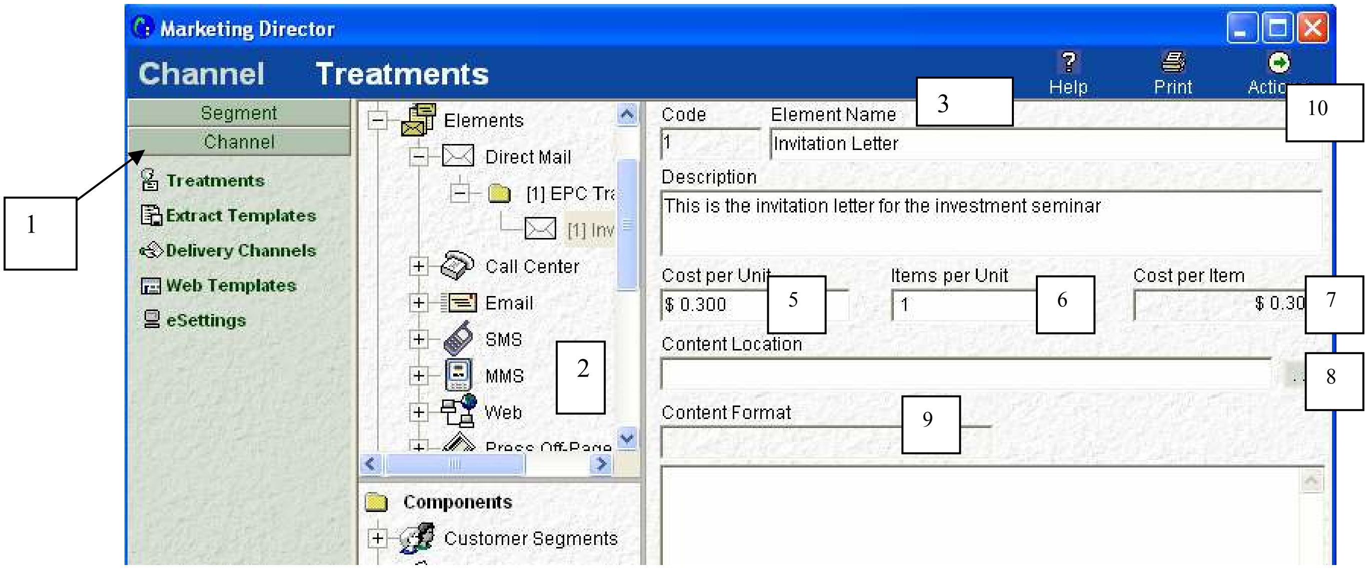
Component	**Module(s) created in**
Treatments	Treatments
Segments	Query Designer
Delivery Channels / Extract Templates	Delivery Channels / Extract Templates
Scheduling Campaign	Campaign Manager or Schedule Manager

Treatment – This is the marketing message being sent in the campaign and is created with help of elements. Elements must be created prior to create a treatment

Creating Elements

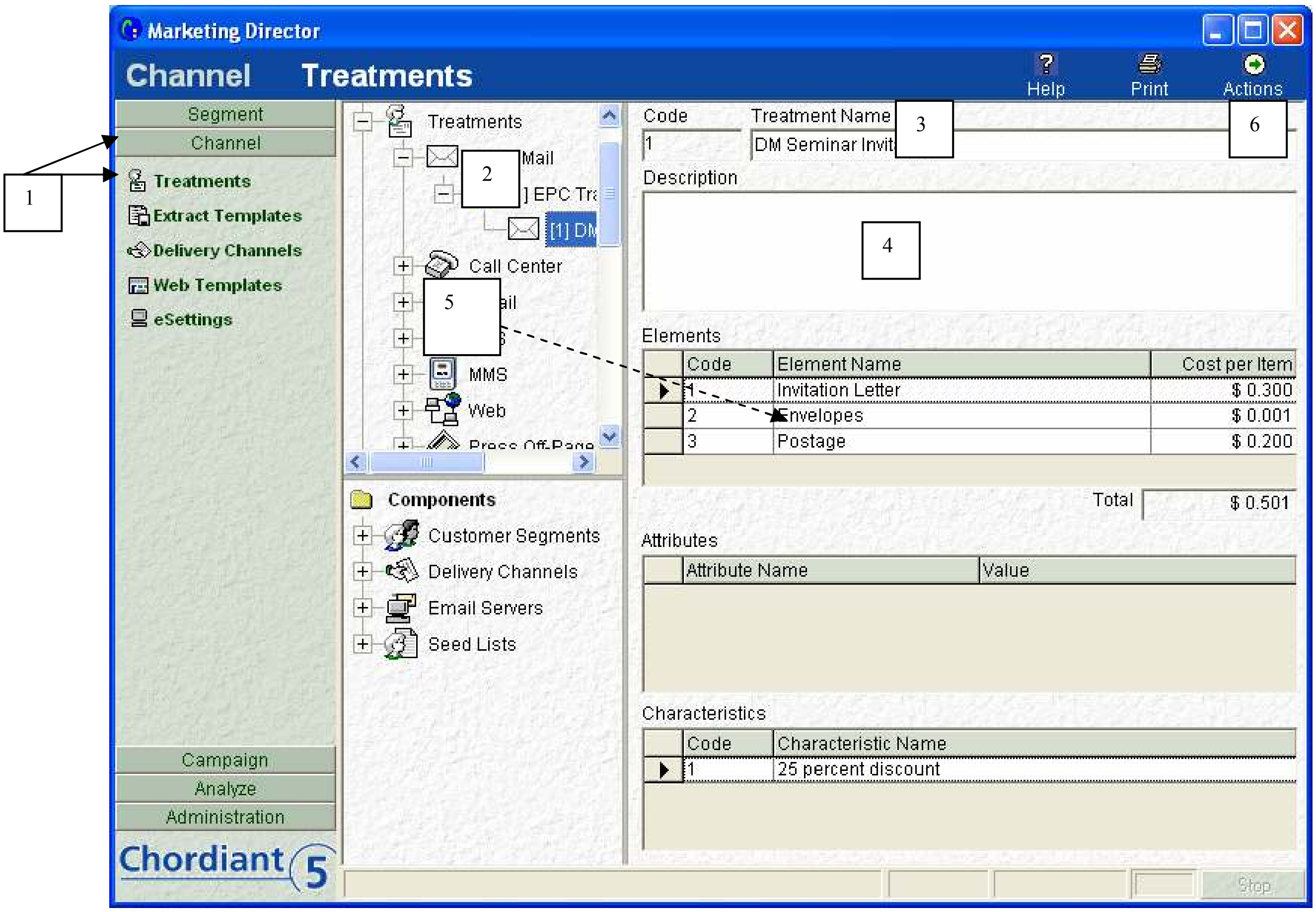
1. Select Channel Button off the main screen, then Treatments (if you're not already there)
2. Right click the direct mail element folder and select Create
3. Enter the element name – invitation letter
4. Enter the element description
5. Enter the cost per unit - 30 cents
6. Enter the Items per unit - 1
7. Cost per item is automatically calculated
8. Enter the content location (location where element/graphic is located, For example, c: \Marketing Director\graphics\invitation_letter.doc)

9. The content format is automatically filled with the appropriate format (once the content location [file] is selected)
10. Select Actions/Save (in top right corner)



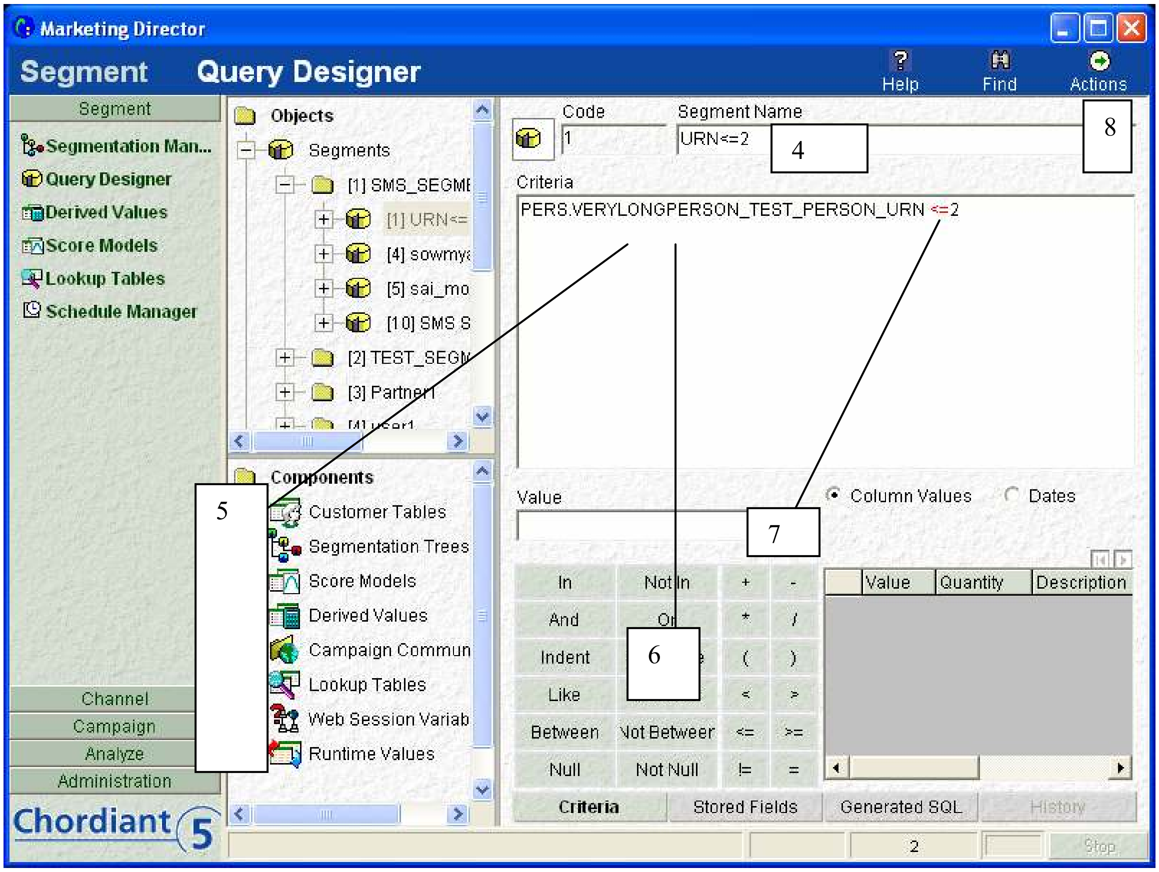
Creating Treatments

1. Select Campaign Button off the main screen, then Treatments (if you're not already there)
2. Right click the direct mail treatment folder and select Create
3. Enter the treatment name – seminar invitation
4. Enter the treatment description
5. Drag/drop the desired element(s) into the Elements work area (letter, envelopes, postage)
6. Select Actions/Save (in top right corner)



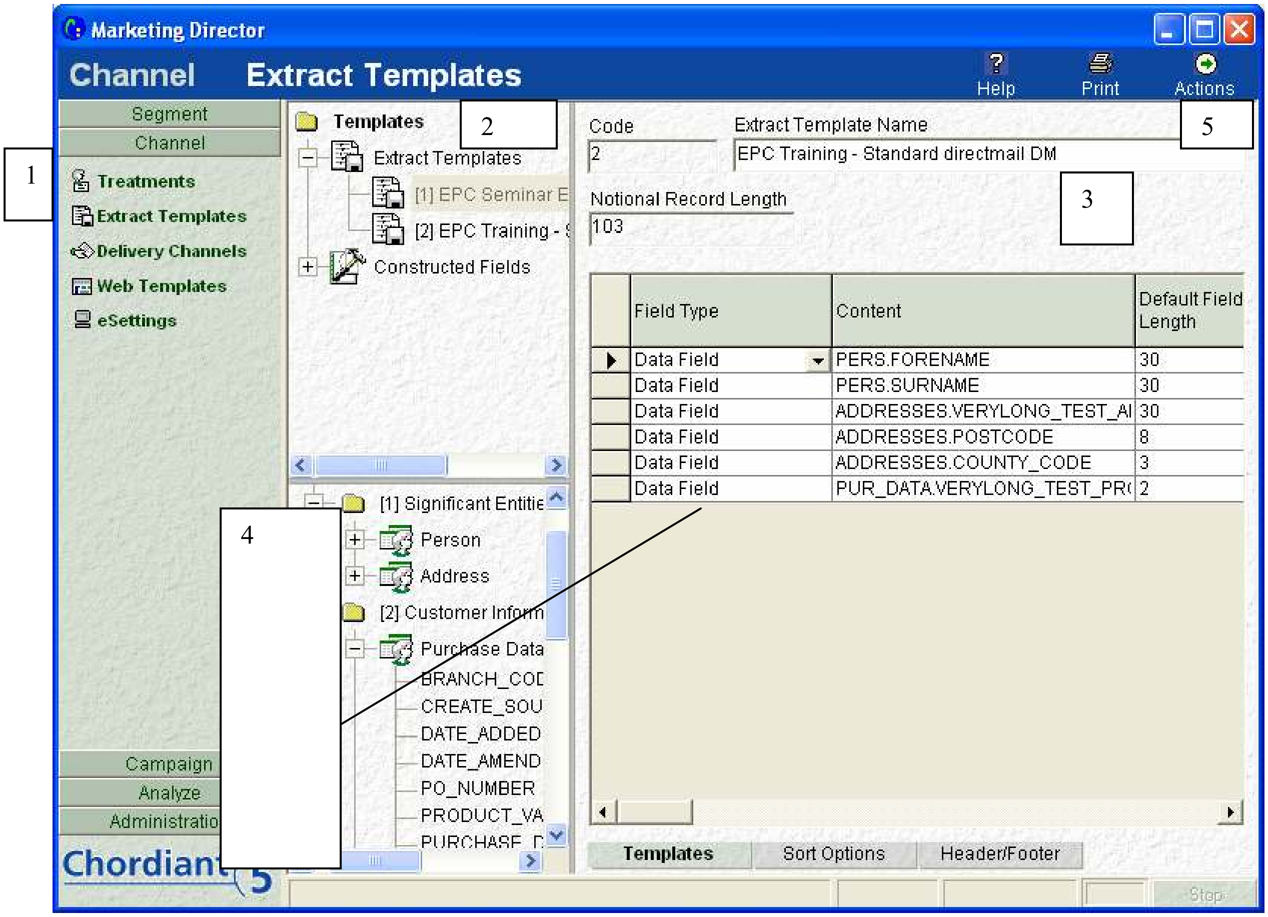
<u>Segment –</u> This is the audience i.e. the group of people targeted to receive the message. Segments or Base-segments are created using the Query Designer

1. Select Segment Button off the main screen, then Select Query Designer (if you're not already there)
2. Expand Segments
3. Right click the folder you wish the segment to reside under and select create (create a folder if necessary)
4. Name the query/segment – Active Customers
5. Drag/drop appropriate Customer Table and Field – Persons.Goneaways_Flag
6. Click the appropriate operator - =
7. Enter appropriate value - 'N'
8. Select Actions/Save



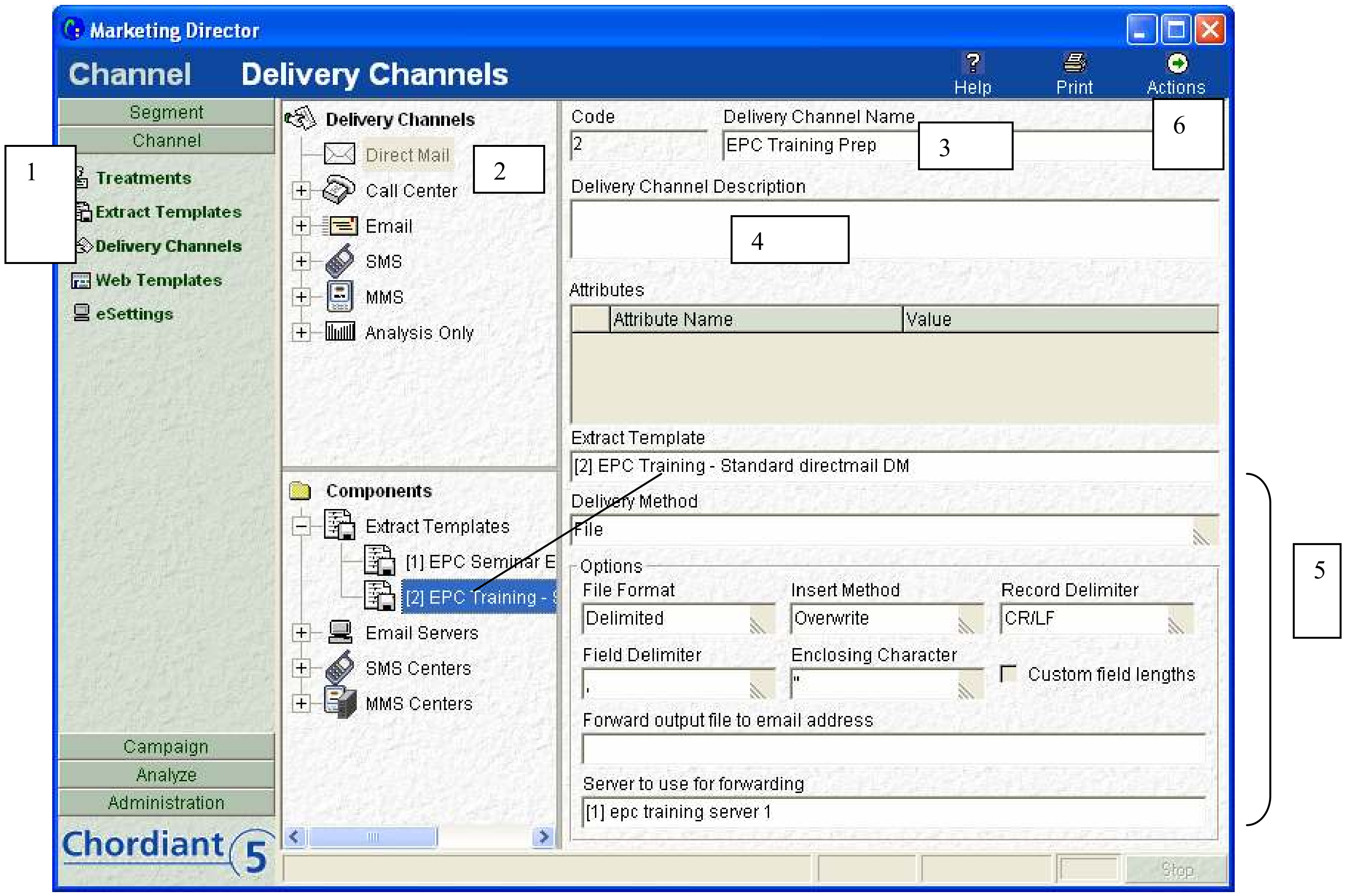
Extract Template - Contains the list of information (fields) on customer needed to perform the communication. They are used to identify the data you wish to write to the output file / database. The extract template is used in conjunction with Delivery Channels. The extract template provides the data extract and the delivery channel determines how the customer will be contacted (via direct mail, email, etc.). For example, if you're developing a direct mail campaign, the extract template created is used to determine the contents of final output file, and contains standard mailing data, as well as any other customization needed. The output file is then forwarded to the mail house or fulfillment house (in the case of direct mail campaigns).

1. Select Channel Button off the main screen, then Select Extract Templates (if you're not already there)
2. Right click Extract Templates and select Create (to create a new template)
3. Name the template –Training standard direct mail
4. Drag/drop appropriate Customer Table and Fields (to the extract template grid area)
5. Select Actions/Save (in top right corner)

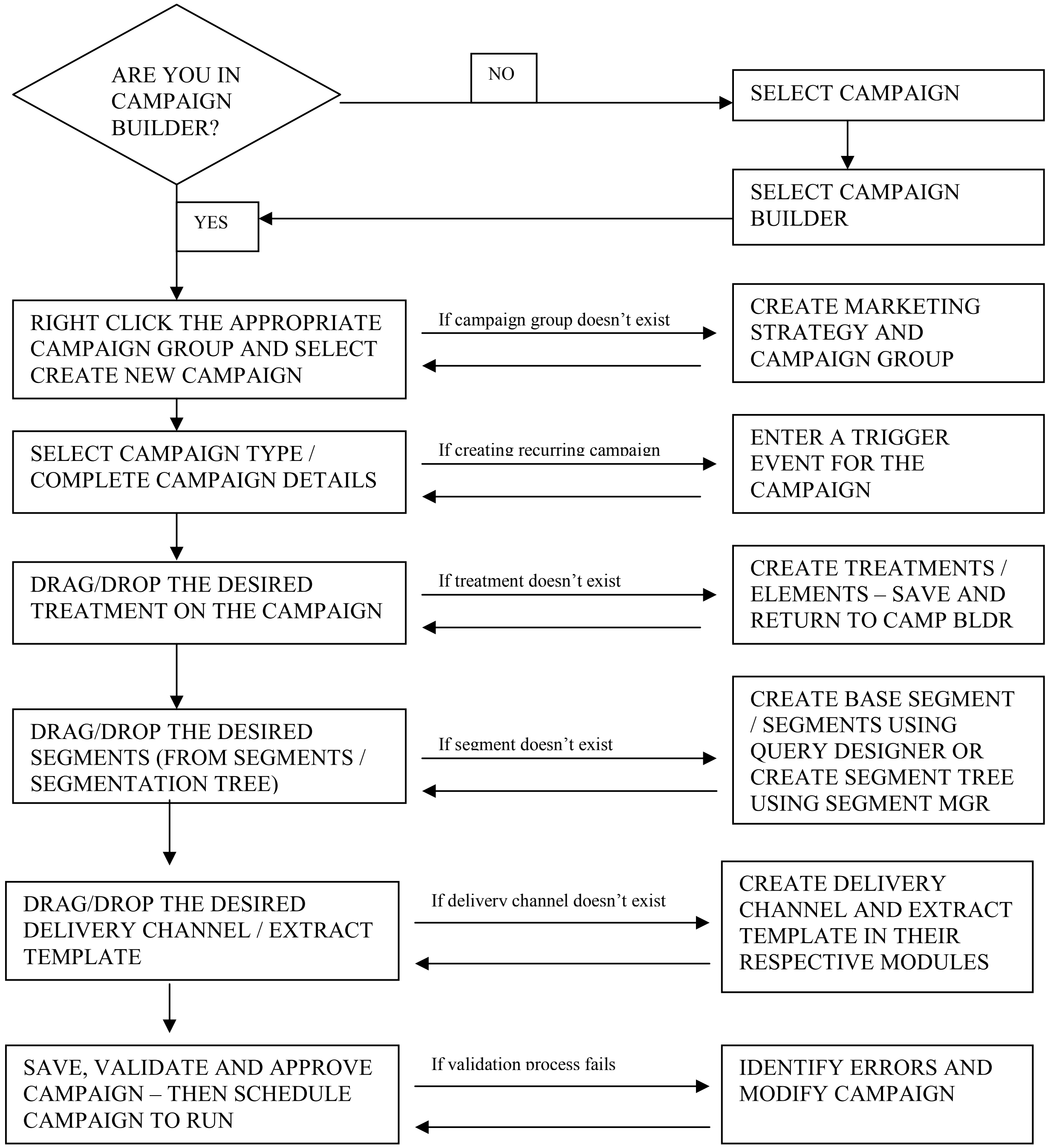


<u>Delivery Channel –</u> Mode by which the marketing message is transmitted to the audience. Delivery Channels reside under Channel, and are required components of the campaign management process. They are used to identify how you want to communicate with your customers (the channel). Delivery Channels can be defined for each type of outbound communication, i.e. direct mail, email, call center, SMS, MMS and Analysis Only. They provide the delivery vehicle for the extract template. Since Delivery Channels consist of Extract Templates, it is best to create the extract before creating the Delivery Channel. To associate the extract template to the delivery channel, open the desired delivery channel and drag/drop the extract template to Extract Template in the work area, as displayed below

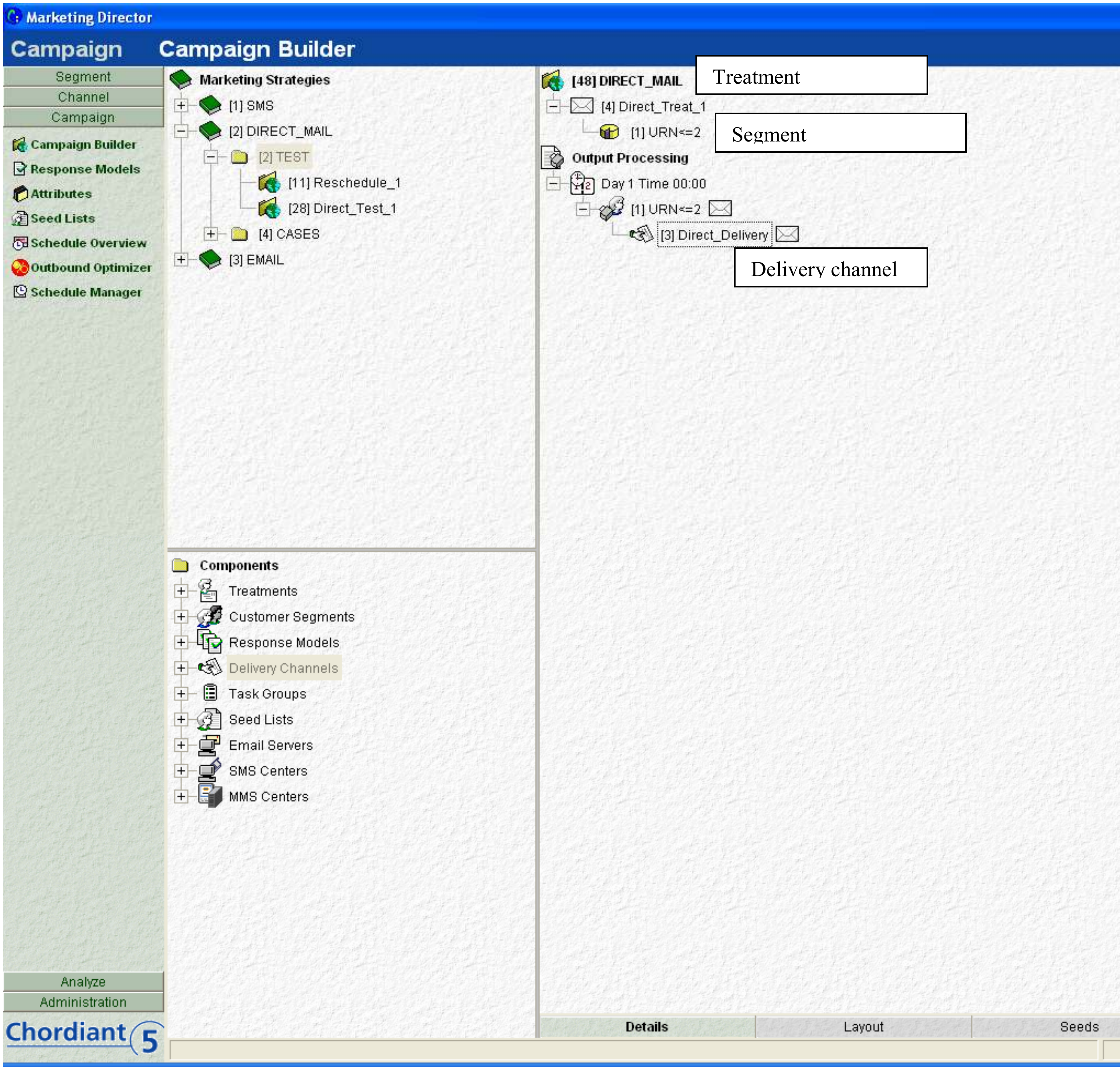
1. Select Channel Button off the main screen, then Select Delivery Channels (if you're not already there)
2. Right click the appropriate channel and select Create (to create a new delivery channel). Be sure you're under the appropriate channel when selecting create.
3. Name the delivery channel – training direct mail
4. Enter a description if desired
5. Complete the screen, as displayed below (all items are not required for every channel)
6. Select Actions/Save (in top right corner)


Marketing Director
Channel
Delivery Channels
Help
Print
Actions
Segment
Channel
Treatments
Extract Templates
Delivery Channels
Web Templates
eSettings
Campaign
Analyze
Administration
Chordiant 5
Delivery Channels
Direct Mail
Call Center
Email
SMS
MMS
Analysis Only
Components
Extract Templates
[1] EPC Seminar E
[2] EPC Training - S
Email Servers
SMS Centers
MMS Centers
Code
2
Delivery Channel Name
EPC Training Prep
Delivery Channel Description
Attributes
Attribute Name
Value
Extract Template
[2] EPC Training - Standard directmail DM
Delivery Method
File
Options
File Format
Delimited
Insert Method
Overwrite
Record Delimiter
CR/LF
Field Delimiter
,
Enclosing Character
"
Custom field lengths
Forward output file to email address
Server to use for forwarding
[1] epc training server 1
Stop
1
2
3
4
5
6

The Flow graph for creating campaigns is as follows:



Sample Direct Mail Campaign:



SCHEDULE CAMPAIGN*

Overview

Once your campaign is built, you must schedule it for execution. This is a *required* component – if you do not place the campaign in the scheduler, it will never run. First you must approve/validate the campaign. This option resides under Actions. Once approved, schedule the campaign while in Campaign Builder using Actions / Schedule Campaign.

Validating the campaign ensures the campaign is accurate and all required components are complete. Validation can be run separately under Actions or automatically as part of the approval process. After approving the campaign, it is available for execution. As you complete each process, the campaign status is changed accordingly. To view the status, click on the status tab at the bottom of the screen.

Once scheduled, a campaign cannot be modified (except for costs). Although scheduled from Campaign Builder, the campaign is maintained in Schedule Manager. Schedule Manager tracks each campaign, each cycle of the campaign, and each component of the campaign.