

## Email Marketing

Let's take a quick look at email marketing with Online Business Console. First off we get started by creating some lists. You create lists to define the audience for your marketing. Since we've got an integrated customer database, your lists are simply a way to create sub groups within your main database. By the way, if you delete a list, you don't delete the people in the list!



Once your list has been saved you are able to add customers to it through segmenting customer database.

### *Segmenting Customer Database*

Segment Your Customer Database tab will take you to the custom customer reports section where you'll be able to define your recipient selection criteria

Click on the 'Create a New Customer Report' button shown in the action box. Now, choose your report type. Each report type will result in a list of customers. However, each different report type will also enable you to set extra criteria and export extra information based on the report type you choose.

**Choose Report Type**

- Contacts Only
- Companies Only
- Customers (Contacts & Companies)
- Customers and Cases
- Customers and Orders
- Customers and Opportunities
- Customers and Bookings
- Customers and Web Apps

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For creating email marketing lists we're interested in the 'Contacts' type reports.

- Contacts Only is for a mailing list whose criteria and results are purely based on contact records (such as location, age, gender etc)
- Customers and Cases are for creating mailing lists based on who has submitted web forms and their responses.
- Customers and Orders is for creating mailing lists based on customer's orders e.g. you may want to target high spenders at your online shop whose shopping basket exceeded a certain value.
- Customers and Opportunities is creating mailing lists to be sent to prospects who have sales opportunities in your system. You may want to send an email to the group of prospects who are in the final stages of the sales pipeline to give them a final push.
- Customers and Bookings is for creating mailing lists to be sent to customers who have made bookings in your systems before.

Important Each Report Type is slightly different. We recommend you explore each type to understand the differences fully.

### Selecting What You Want To Show

When creating a mailing list, the system will put the customers name and email addresses into the list only.

However, to ensure our report is correct, it's helpful to show any other relevant fields.

- Customer Name
- Email 1 (Primary) - so we can see the customer's email address

**Choose the Fields that you want to appear on your report**

Data Fields	Address Detail Fields	Contact Detail Fields
<input type="checkbox"/> Company	<input type="checkbox"/> Default Address Type	<input type="checkbox"/> Default Contact Type
<input type="checkbox"/> Create By	<input type="checkbox"/> Billing Address	<input type="checkbox"/> Cell Phone
<input type="checkbox"/> Create Date	<input type="checkbox"/> Home Address	<input type="checkbox"/> Email 1 (Primary)
<input type="checkbox"/> CRM ID	<input type="checkbox"/> PO Box	<input type="checkbox"/> Email 2
<input type="checkbox"/> Customer Type	<input type="checkbox"/> Work Address	<input type="checkbox"/> Email 3
<input type="checkbox"/> Date of Birth		<input type="checkbox"/> Home Fax
<input type="checkbox"/> Double Opt-In Status		<input type="checkbox"/> Home Phone
<input type="checkbox"/> First Name		<input type="checkbox"/> Pager
<input type="checkbox"/> Industry		<input type="checkbox"/> Web Address
<input type="checkbox"/> Last Name		<input type="checkbox"/> Work Fax
<input type="checkbox"/> Last Update By		<input type="checkbox"/> Work Phone
<input type="checkbox"/> Last Update Date		
<input type="checkbox"/> Lead Source		
<input type="checkbox"/> Middle Name		
<input type="checkbox"/> Own By		
<input type="checkbox"/> OwnDate		
<input type="checkbox"/> Password		
<input type="checkbox"/> Rating		
<input type="checkbox"/> Title		
<input type="checkbox"/> Username		

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Click 'Next' to move onto the following step.

In this stage of the process you'll need to apply the relevant search filters to your customer records.

**Filter by Fields**

Rating	equals	Hot
-- None --	equals	
-- None --	equals	
-- None --	equals	
-- None --	equals	

**Filter by your own custom CRM Forms and Fields**

-- Please Select --

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If you want a list of all customers who you have rated as a 'hot prospect' you would filter as above. As you would've noticed, you have the ability to select customers based on all different types of criteria that you're able to choose in the filtering step.

Click on 'Generate Report' after you've set your criteria  
 You should now see a list of customers with their email addresses.

Name	Create Date	Email 1 (Primary)	View
Tony Reidy	14-Jul-2008	[REDACTED]	View
Ryan Fortini	17-Jun-2008	[REDACTED]	View
Paul Dodson	17-Jun-2008	[REDACTED]	View
Sean Powell	06-Aug-2008	[REDACTED]	View
Marion Arlidge	22-Aug-2008	[REDACTED]	View
Fraser McCulloch	12-Aug-2008	[REDACTED]	View
Maxim Vorobiev	22-Aug-2008	[REDACTED]	View
Tracy Martorello	05-Aug-2008	[REDACTED]	View
Jeff Weir	24-Aug-2008	[REDACTED]	View
Andrew Hemimway	29-Aug-2008	[REDACTED]	View
Trevor Rowe	29-Aug-2008	[REDACTED]	View
David Allsop	15-Jul-2008	[REDACTED]	View
Joseph Terres	24-Aug-2008	[REDACTED]	View
no limits	30-Aug-2008	[REDACTED]	View
Esteban Chavez	31-Aug-2008	[REDACTED]	View
Stephen Kerrigan	31-Aug-2008	[REDACTED]	View
Bill Kaylor	31-Aug-2008	[REDACTED]	View
Sarah Worsham	31-Aug-2008	[REDACTED]	View
Amanda Iman	31-Aug-2008	[REDACTED]	View
James Reggel	30-Aug-2008	[REDACTED]	View

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Click here to add your customers to a mailing list

To add these customers to a mailing list you'll need to click on the 'Add Customers To' then choose the mailing list and then click on 'Submit'

You've now successfully created a targeted mailing list for customers!

As you would've noticed, you have the ability to select customers based on all different types of criteria that you're able to choose in the filtering step.

You've got the option of creating mailing lists with customers who've submitted an inquiry in the last month by using 'Customers and Cases' or a mailing list with customers who are close to the end of your sale pipeline with 'Customers and Opportunities' or even customers who've made a purchase on your online shop in the last 3 months with Customers and Orders.

### Email Campaigns

Before you create an email marketing campaign you have to *choose the type of campaign* you want to send. If you are new to email marketing then more than likely you will want to send an email to a number of your customers and measure its effectiveness. When we talk about "measuring effectiveness" we are referring to how successful your newsletter was as far as how many recipients received and read it. Every time you send out an email newsletter, the *system will automatically measure who opened your email*, which links within the email they selected and how many recipients unsubscribed from your newsletter. There are also many other useful reports that will help you measure the success of your campaigns.

There are 3 main parts to every email newsletter campaign:

- Choosing the type of campaign

- Writing the content of your newsletter
- Choosing the recipients of your newsletter

### *One-off vs. loyalty-based campaigns*

One-off campaigns are the most popular forms of email marketing. A *one-off campaign* is an email newsletter that is sent to a group of your customers at some date in the future. For example you might write a newsletter called "April Newsletter" and send it to your customer database. This is a one-off newsletter. Of course you may continue on and send another newsletter in May called "May Newsletter" but again, this is a one-off newsletter.

If you are new to email marketing then you should start with a one-off campaign, then when you are ready you should also explore loyalty-based campaigns.

### *Understanding Loyalty-based campaigns*

Loyalty-based campaigns automate communication to a group of your customers on a one-by-one basis. There are many types of loyalty-based campaigns.

To give you a better understanding here is an example of a birthday loyalty campaign. Imagine you are a restaurant, a hairdresser, a massage parlour or any other type of business which regularly deals with customers.

If you are in a position to collect your customer's date of birth or even just their day and month of birth, then you can setup birthday loyalty-based campaigns that automate communication to your customers on a one-by-one basis.

Once you create one of these campaigns and choose the list of recipients, as each customer's birthday month is reached a customised email is sent to that recipient alone. For example you can send an email wishing them happy birthday and include a sweetener such as a 20% discount or a 2-for-1 voucher if they purchased with you in the month of their birthday. This process continues around the clock and for every single customer in your recipients list. You needn't remember when customer birthdays are but you can rest assured that you are wishing them happy birthday and keeping them up to date with your latest products and offers.

### *Sending a one-off campaign*

Creating a one-off campaign is a simple and quick process. You need to have covered off 3 essential items.

1. The **date** to send the campaign
2. The **content** of your campaign
3. The **recipients** of your campaign.

To get started, Click on create a new campaign under Email campaigns tab and use the wizard to go through the steps to create your one-off campaign. The wizard is intuitive and allows for the creation of stunning newsletters without any prior technical knowledge just follow the steps from 1 to 7, and don't forget to Save at the end!

**Choose type of Campaign**

Next Step: Campaign Details

Send a one-off email broadcast to recipients you choose

Create a customer loyalty program for recipients you choose

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**Wizard**

- 1 Choose type of Campaign
- 2 Campaign Details
- 3 Choose the Campaign recipients
- 4 Choose design template
- 5 Provide Campaign content
- 6 Preview and Finish
- 7 Reports and Performance

Once you've set up your campaign you've got access to a range of in depth reports to help you track and improve your email marketing!

**Campaign Summary**

Campaign Type <b>One-off campaign</b> Delivery Date <b>31-Aug-2007</b> Completed Date <b>31-Aug-2007</b> From Email <b>Approved</b> Content Approved <b>Approved</b>	Total Recipients <b>3447</b> Customer Opens <b>799</b> Customer Actions <b>24</b> Bounces <b>724</b> Unsubscribes <b>20</b> <ul style="list-style-type: none"> <li> Customers who opened newsletter</li> <li> Customers who unsubscribed</li> <li> Email addresses that bounced</li> <li> Actions customers took</li> <li> Links customers clicked on</li> <li> Hyperlinks clicked by popularity</li> <li> List of unique hyperlinks clicked</li> </ul>
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**Wizard**

- 1 Choose type of Campaign
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**Related**

- Create another Campaign
- View all Campaigns
- Copy this Campaign

**Overall Summary**

**Customer Actions**

**Statistics**

Opened Rate	Bounced Rate	Top 10 Links	Top 10 Actions
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