Chapter 11

Campaign Management

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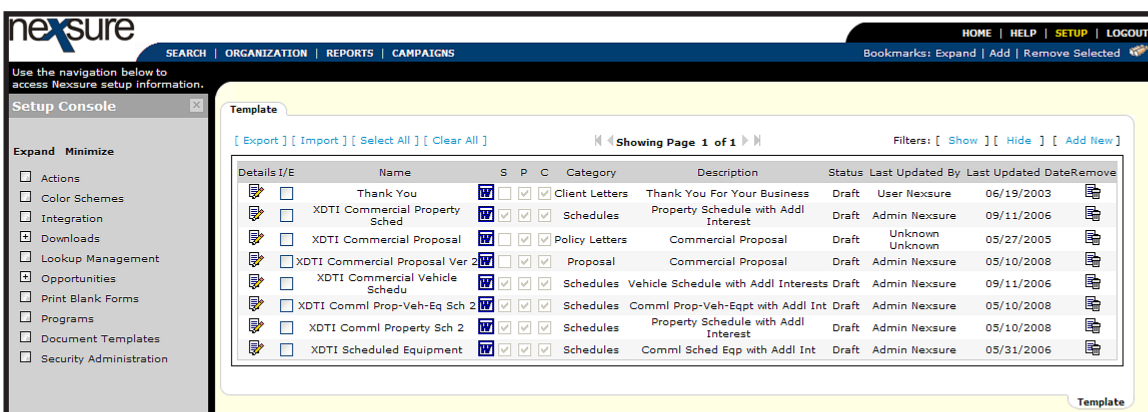
Campaign Management

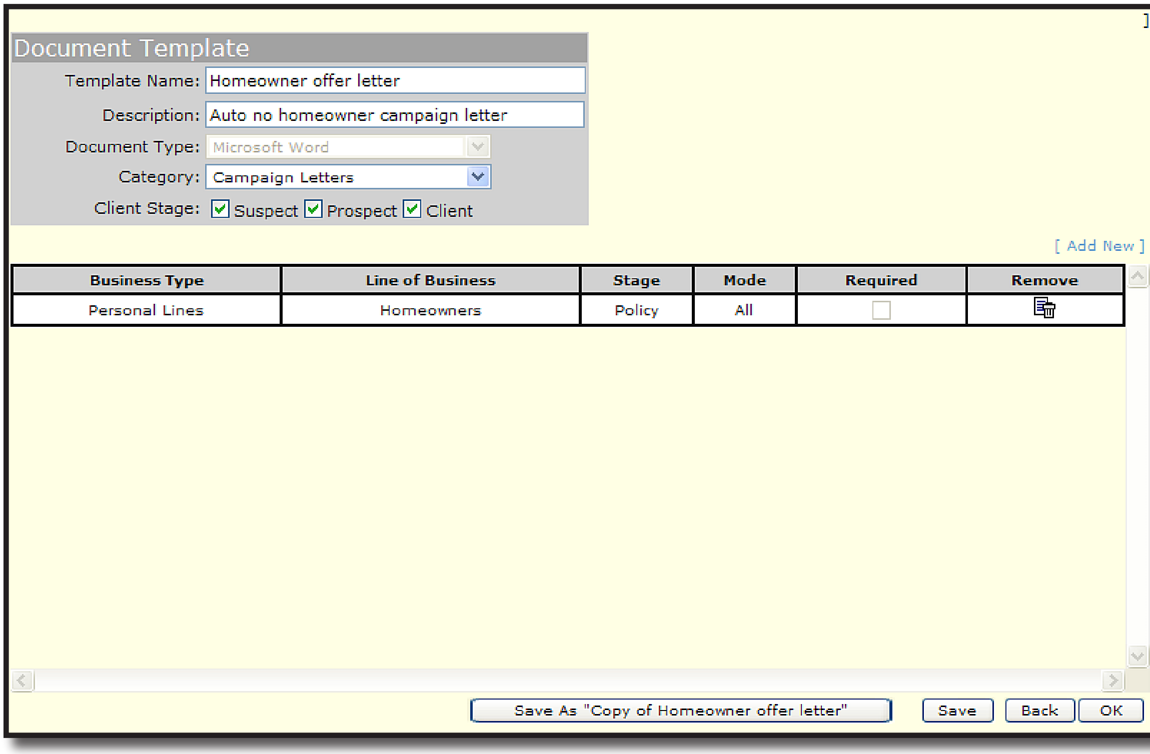
Use Campaigns to communicate with a specific group of clients meeting the same account rounding criteria. For example you could send out a special offer to clients who have personal auto policy but without a homeowner policy. Campaigns in Nexsure can be run to include specific lines of business. Before you begin the campaign, you must first decide who will be your target market for the campaign and determine the lines of business. After deciding what lines of will be included, compose the campaign letter.

Adding the Campaign Management Letter

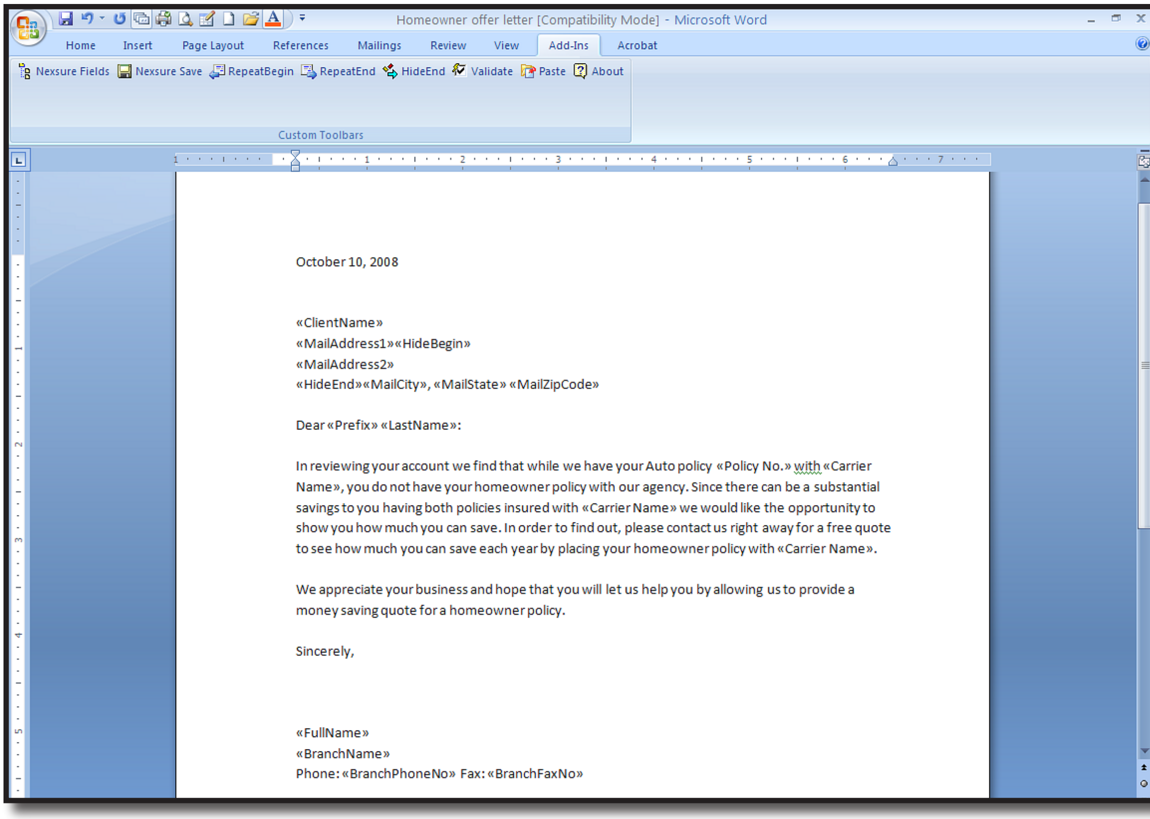
Once the lines of business have been decided, you are ready to create the Campaign letter in Nexsure. To create the letter, access document template setup by clicking on **Setup** on the **Utility** menu and **Document Templates** link on the **Setup Console** and click the **[Add New]** link.



Enter the **Template Name**, **Description** and choose the **Microsoft Word** document type. Select a category to group your campaign letters by and choose the appropriate client stages. (For instructions on setting up categories see Chapter 6 of this manual). Click the **[Add New]** link to add the lines of Business the Rounding report will be run to include for the campaign. Click the **OK** button to launch Microsoft® Word®.



Complete and save the letter. (For more information on adding document templates see Chapter 8 in this manual)



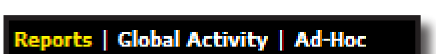
Note: When creating the document template for Campaigns, make sure not to use the **Demographic Data** fields as they will not merge into templates used in Campaigns.

Creating the Rounding Report

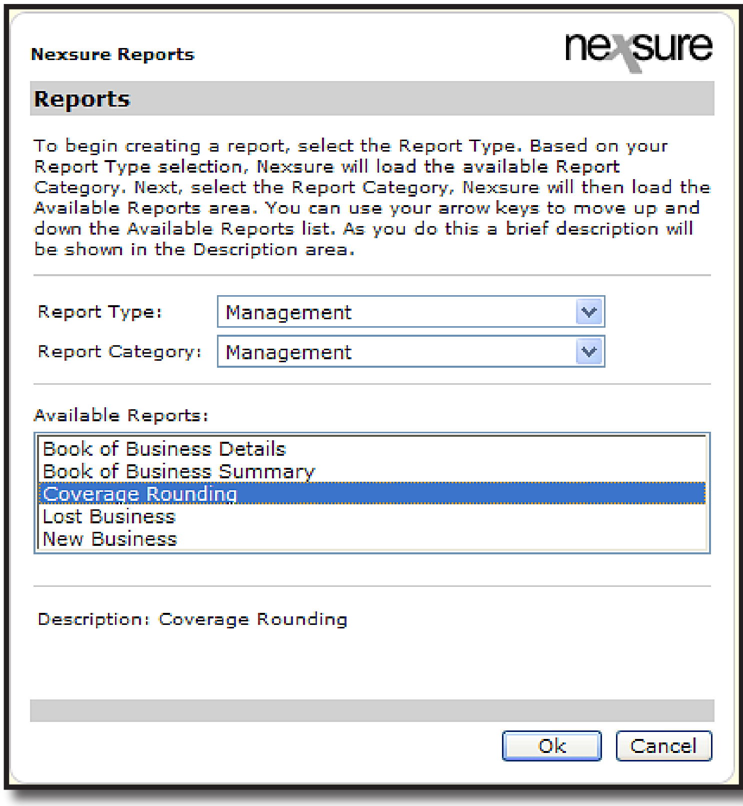
Before a Campaign can be run, you must first create the **Rounding Report**. This report must include the specific lines of business that were added to the document template for this campaign. If the lines of business do not match, you will not be able to select the document template when setting up the campaign.

To create the report, click the **Reports** link on the **Primary** menu.

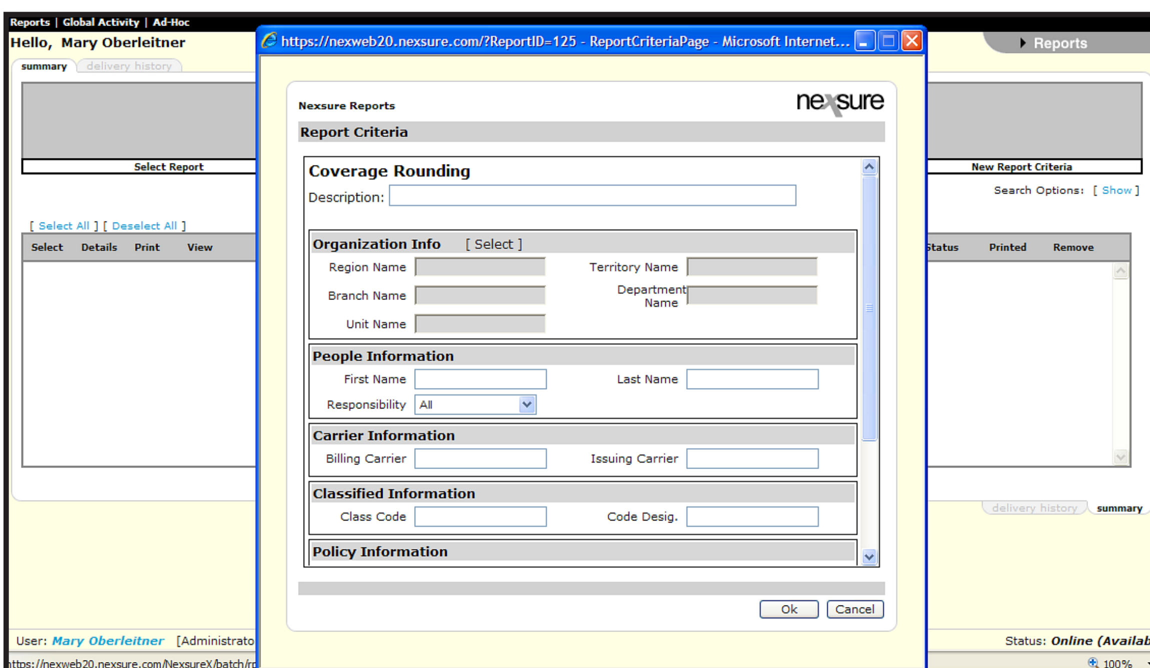
Click the **Reports** link on the **Reports** menu.



From the **Reports** window, select the **Report Type** and **Category** of **Management** and select the **Coverage Rounding** report from the **Available Reports** list and click **OK**.

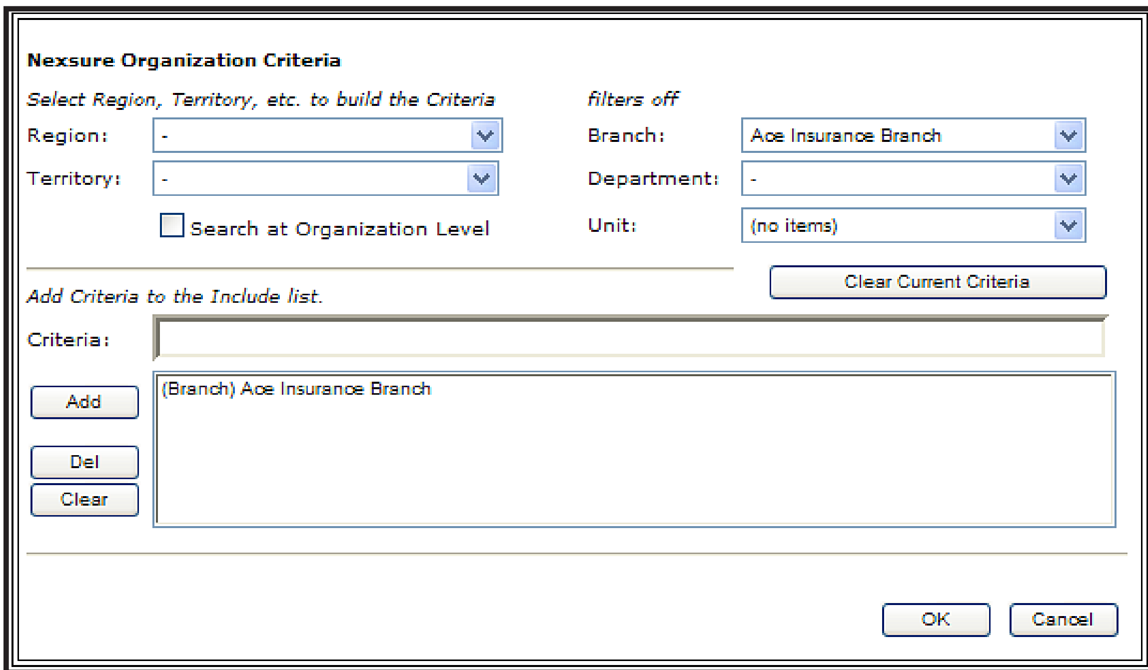


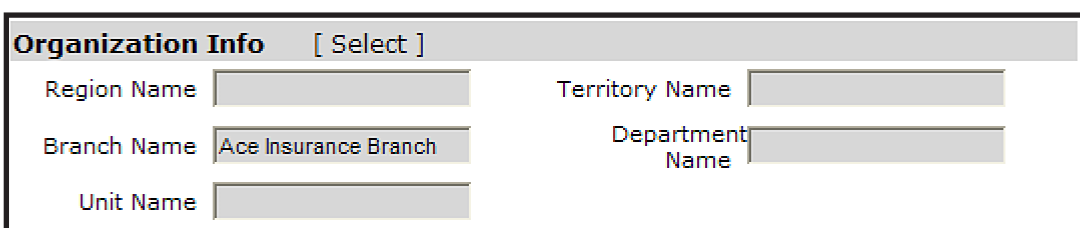
On the **Coverage Rounding** summary screen, click the **New Report Criteria** link on the **Navigation** toolbar to display the **Report Criteria** dialog box.



Entering a description for the report will display in the Coverage Rounding Summary screen to easily locate the report later.

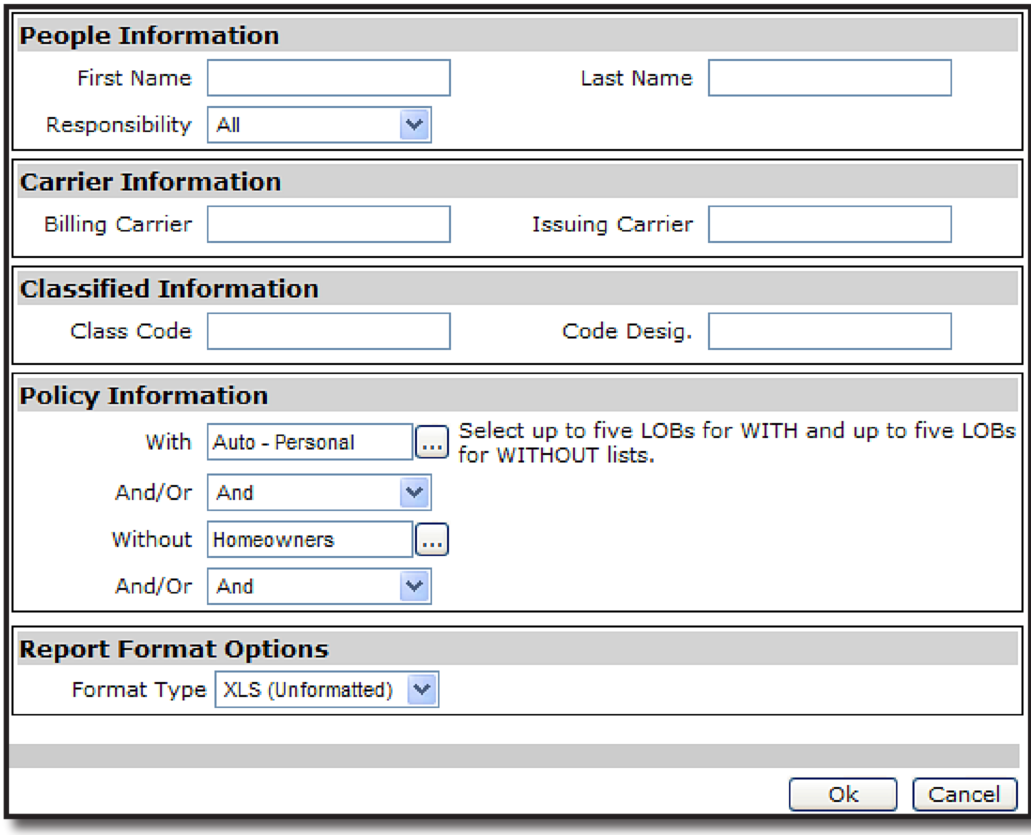
Next select what level of the Organization the report will be run for by clicking the [Select] link. Use the drop down boxes to select the appropriate level and then the **Add** button. Click the **OK** button to add to the criteria.





If running for a specific assignment name or responsibility, complete the People information. If running for a specific Carrier, complete the Carrier Information section. If running for a specific Classified, complete the Classified Information section.

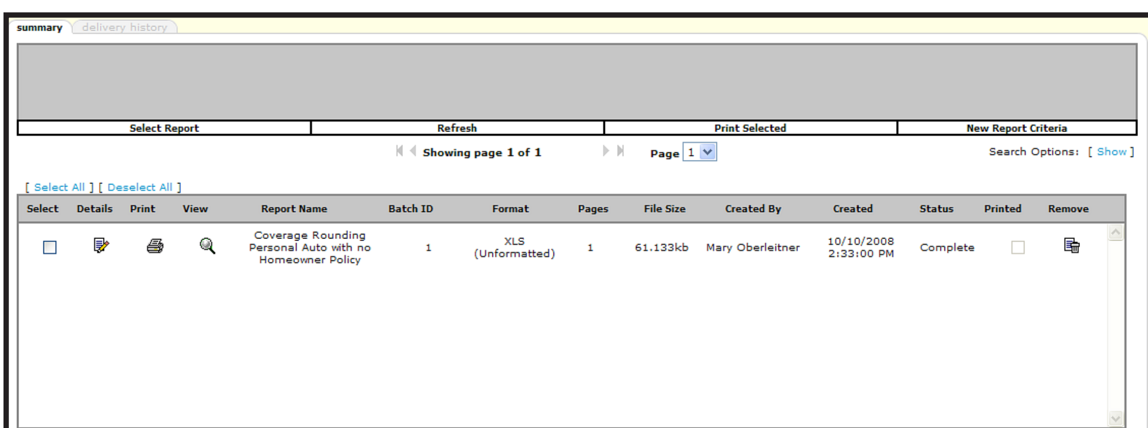
In order to be able to select the document template added in setup, make sure to add the same lines of business to the policy information section. From the Report Format Options, choose an output. Choosing the XLS (unformatted) version allows more flexibility when working with the report. Click the **OK** button to begin report processing. It may take a few minutes for the report to compile, but clicking the **Refresh** link on the navigation toolbar will show the report progress.



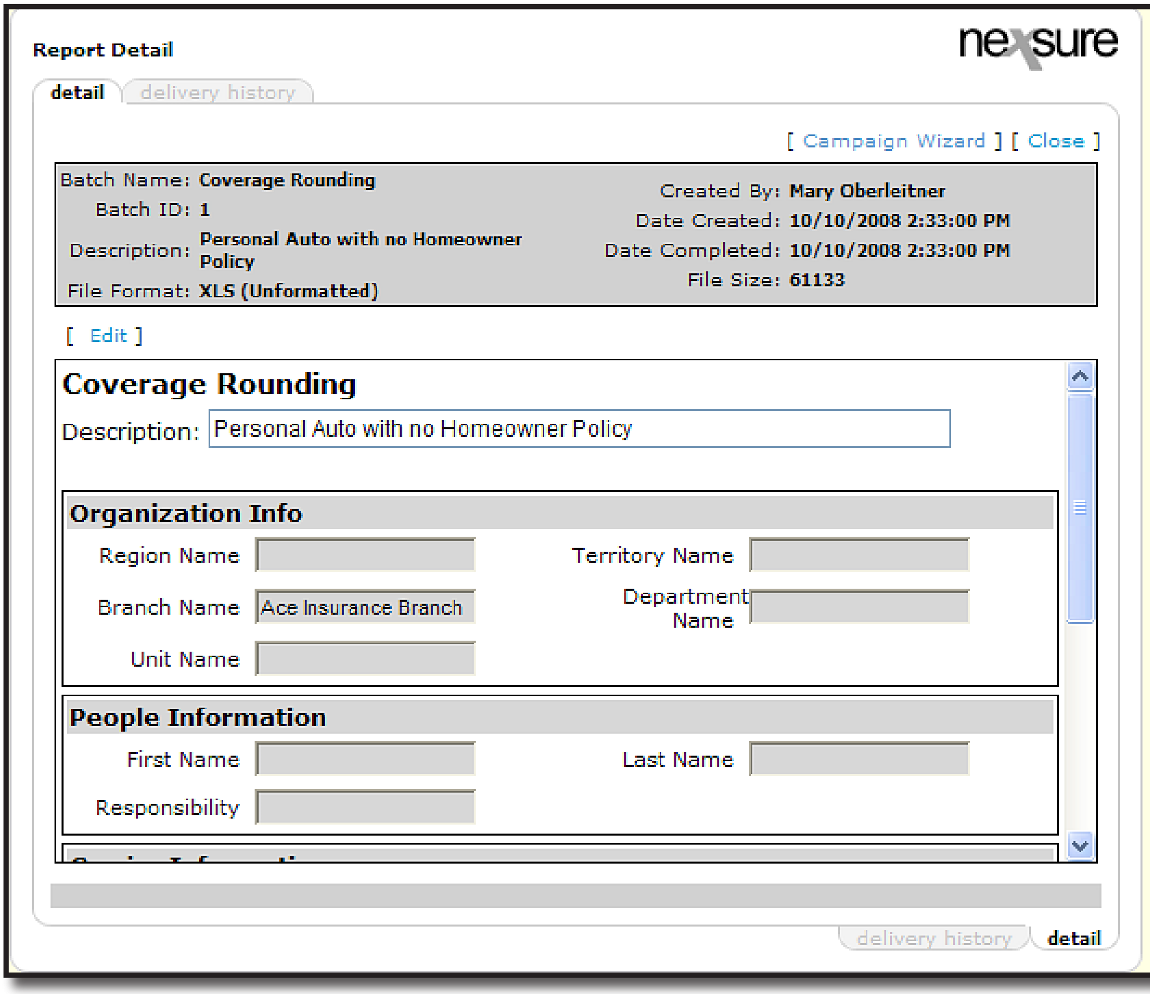
After the report is complied, the campaign may be run at any time.

Campaign Wizard

To launch the Campaign, click the **Details** icon beside the completed **Coverage Rounding Report** to display the **Report Detail**.



On the **Report Detail**, click the **[Campaign Wizard]** link.

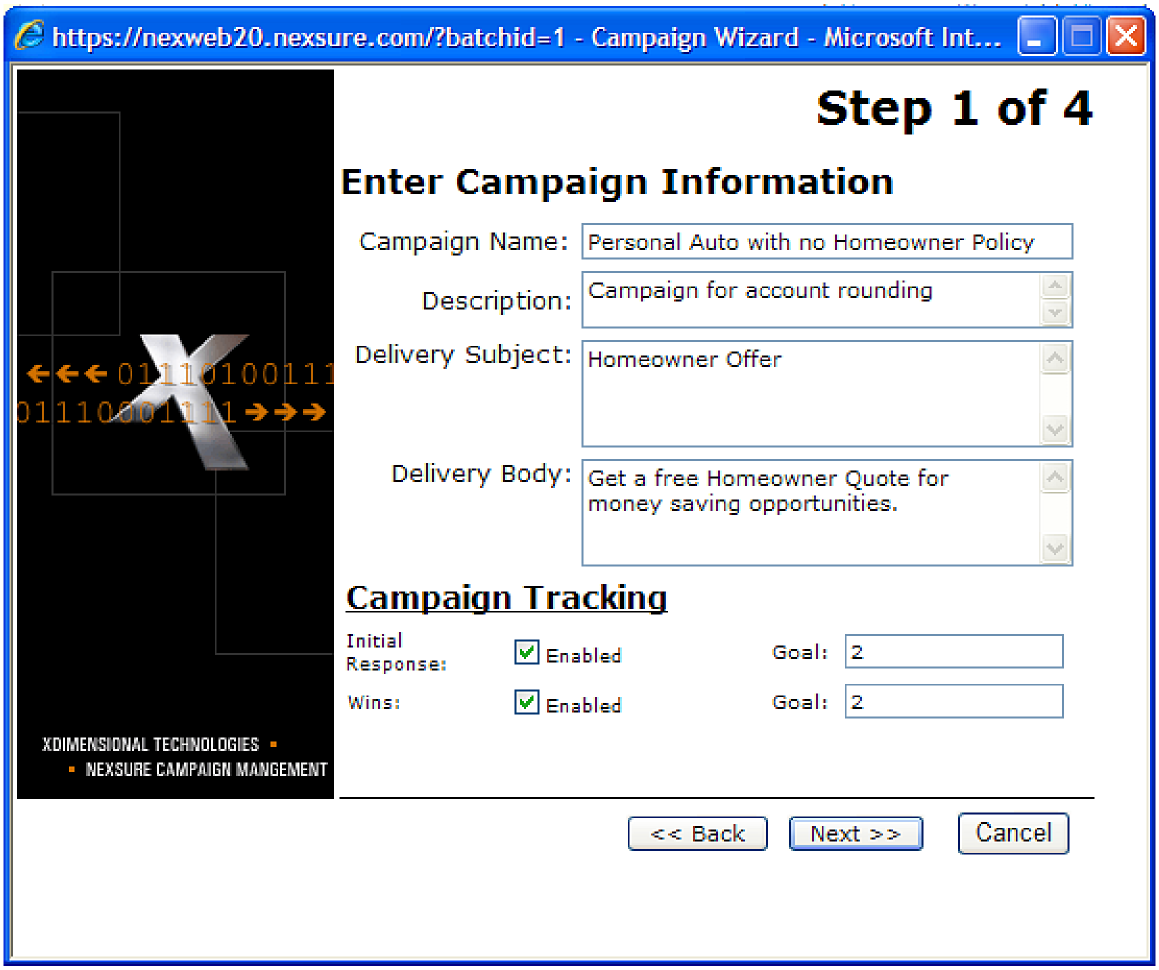


This will launch the Campaign Wizard. Click the Next button to start the process.


https://nexweb20.nexsure.com/?batchid=1 - Campaign Wizard - Microsoft Int...
Welcome to the Nexsure Campaign Wizard
Use the Nexsure Campaign Wizard to communicate to a specific group of contacts.
This wizard will guide you through the four step process of entering the campaign, selecting the template and contact, adding profiling information and selecting the final output.
Click Next to continue or cancel to exit.
XDIMENSIONAL TECHNOLOGIES
NEXSURE CAMPAIGN MANGEMENT
Next >>
Cancel

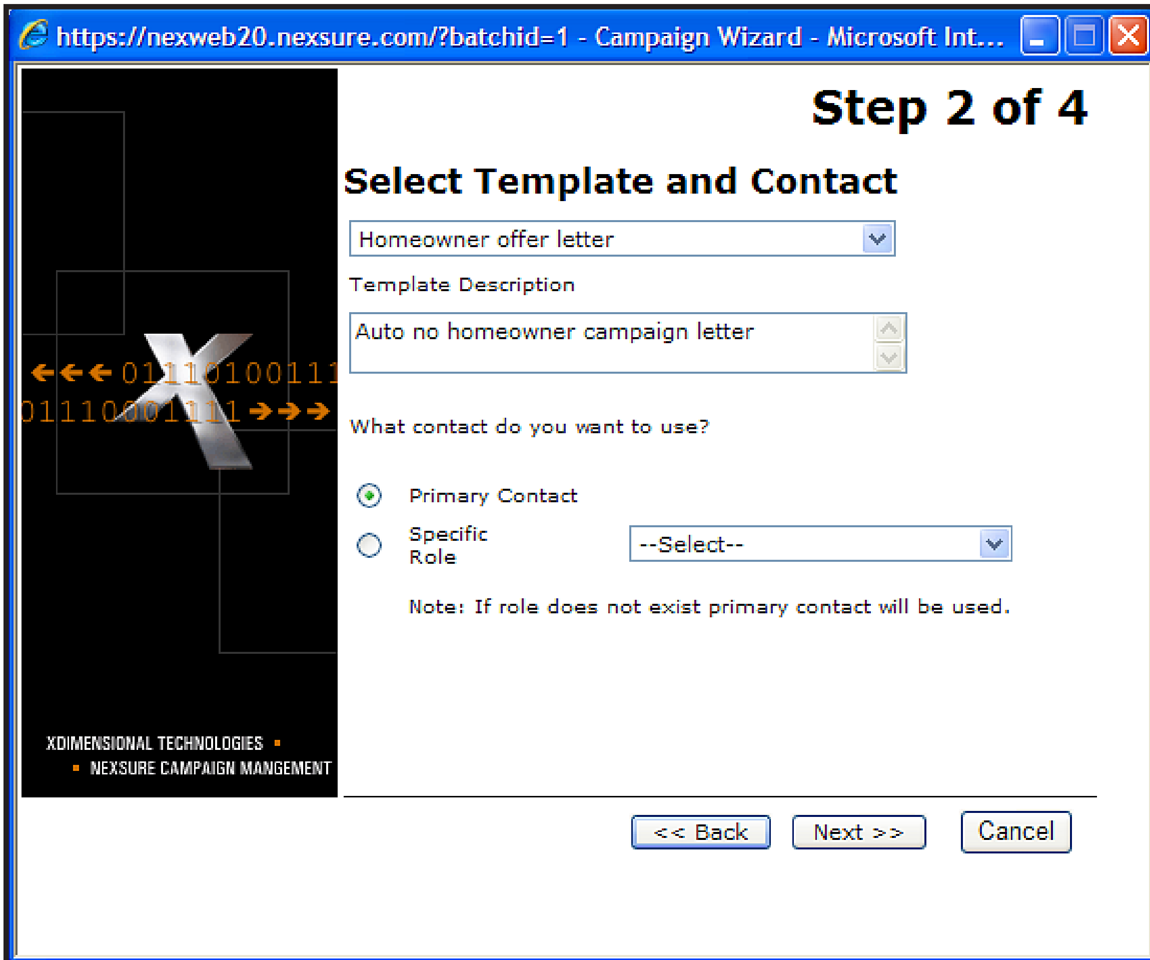
In step one of the process enter in the Campaign Information. The **Name** and **Description** fields are required. The information here should be brief, however, if delivering via fax or email, make sure to complete the **Delivery Subject** and **Body**.

If tracking is desired, make sure to place a check in the **Enabled** check boxes beside **Initial Response** and **Wins**. Entering in a number for the goals will help you see how close you get to your goals. This will require though that staff members taking the calls to enter the campaign results as they are received. Once this screen is completed, click the **Next** button to proceed to step 2.

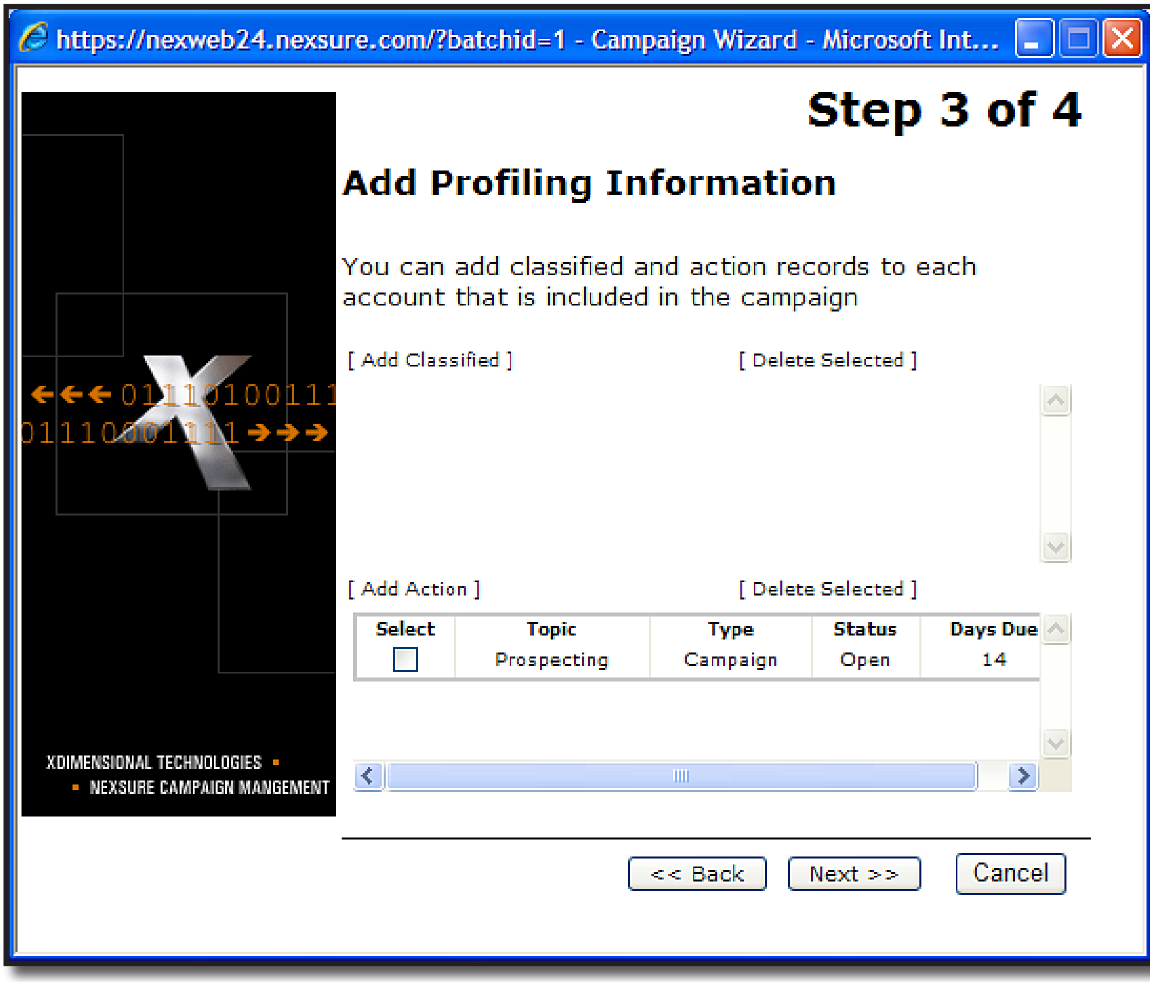


In Step 2 a template must be selected in order to proceed. The letter is what will be delivered to recipients of the campaign. Select the template from the drop-down box. The **Template Description** populates with the description entered when the document template was setup and may not be changed here.

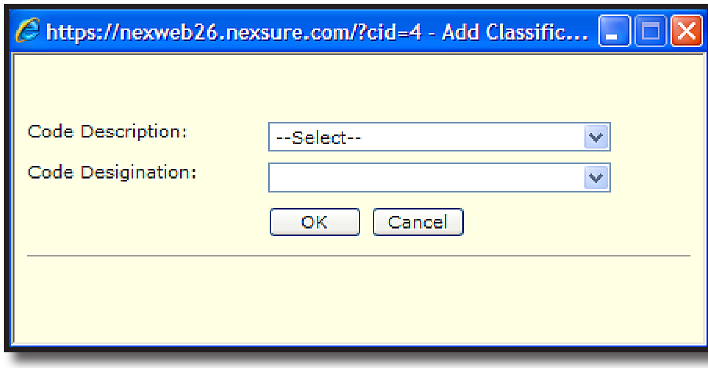
Make sure to select the contact the document will be sent to. Select either **Primary Contact** or a **Specific Role** from the drop-down box. If a role is selected it must be on the record or the primary contact will be used in place of the missing role.



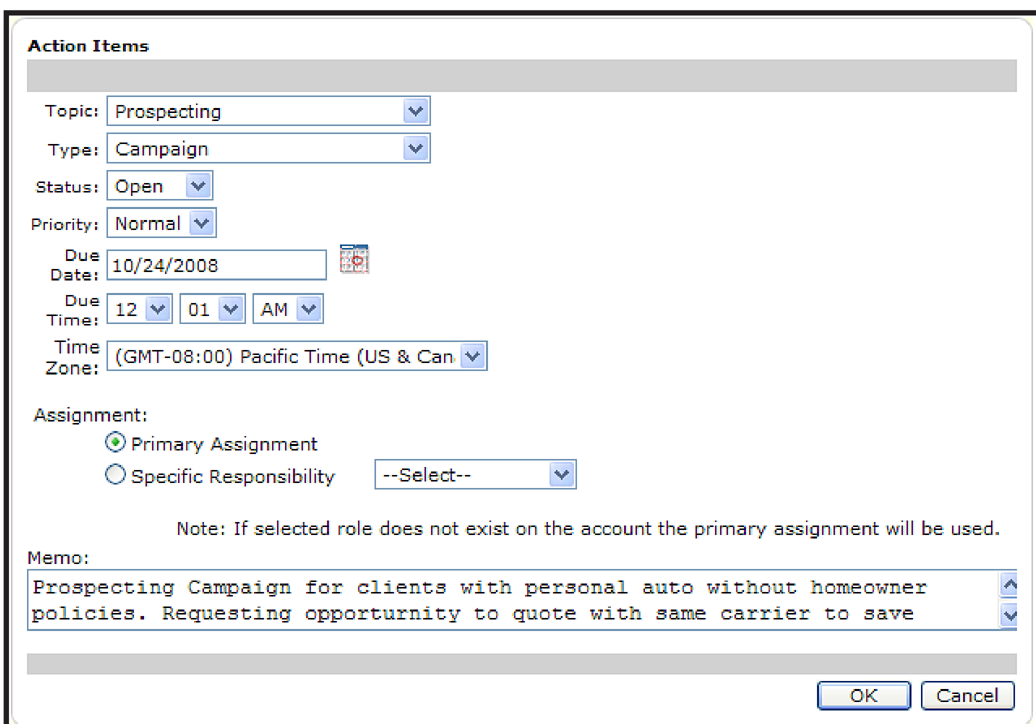
In step 3, add classifieds and or actions that will be used to identify the Campaign by clicking the **[Add Classified]**, **[Add Action]** links as necessary.



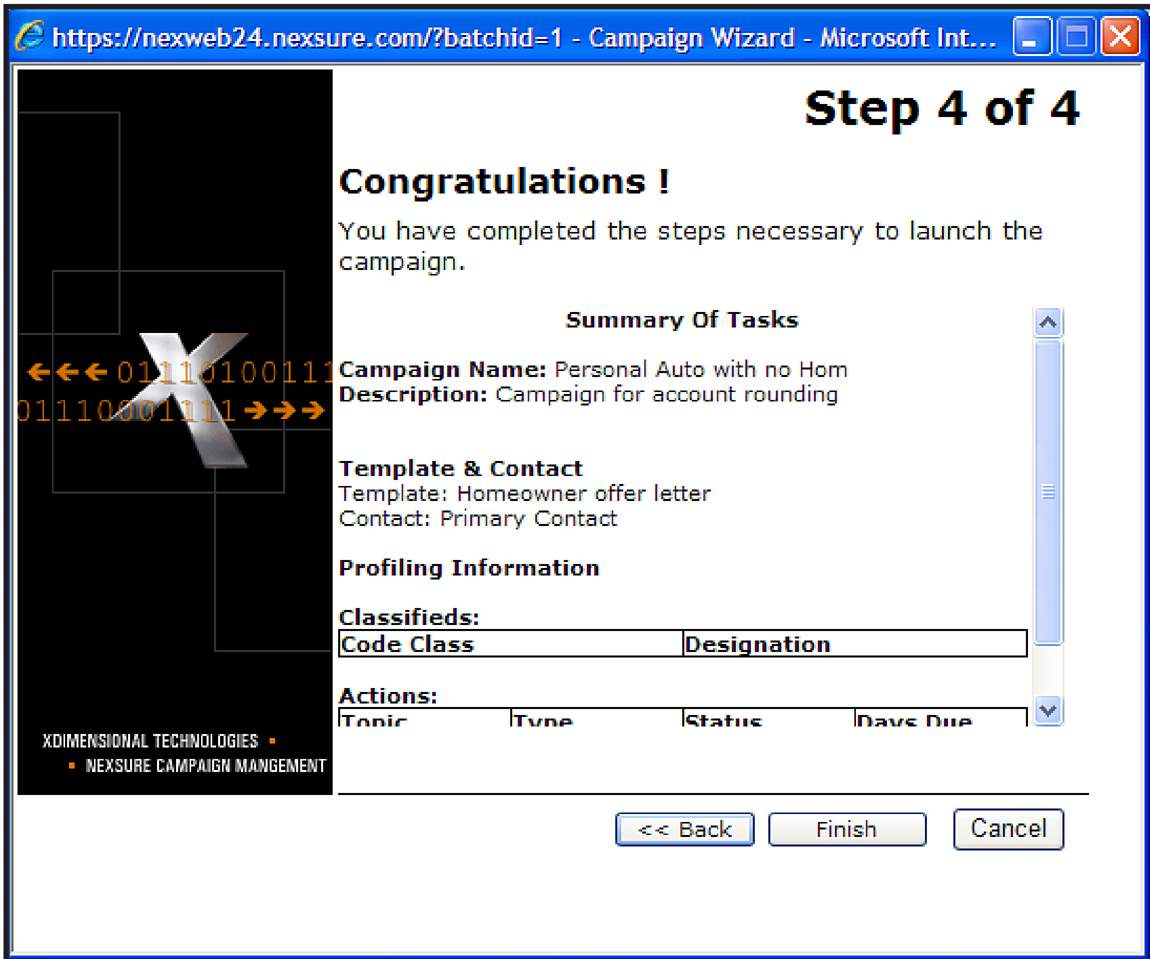
Clicking the **[Add Classified]** link brings up the **Classified Selection** dialog box. Select the classified using the drop-down boxes. Make sure to add the campaign classified in Lookup Management to use in the Campaign prior to launching the Campaign Wizard. See Chapter 6 in this manual for instructions on adding classifieds. Multiple Classifieds may be added but keep in mind that each classified added here in the wizard will be added to the clients record. Classifieds for campaigns should be thought through carefully as they may be used in gathering data by running a classified report in Nexsure.



Clicking the **[Add Action]** link will bring up the **Action Selection** screen. Before adding actions in the campaigns make sure to add the actions in setup that will be used in the specific campaign (See Chapter 4 of this manual for more information on setting up Actions). The assignment is selected by either primary or a specific responsibility. If selecting by specific responsibility, select this option and choose the responsibility from the drop-down box. If the selected responsibility does not exist on the account the primary assignment will be used when assigning who to follow-up on the Action. Modify the Action as necessary. In the memo portion of the Action, enter any text that is relevant to the campaign. This text will appear on all actions created in the campaign. Once the **OK** button is selected the Action is added to the Campaign.



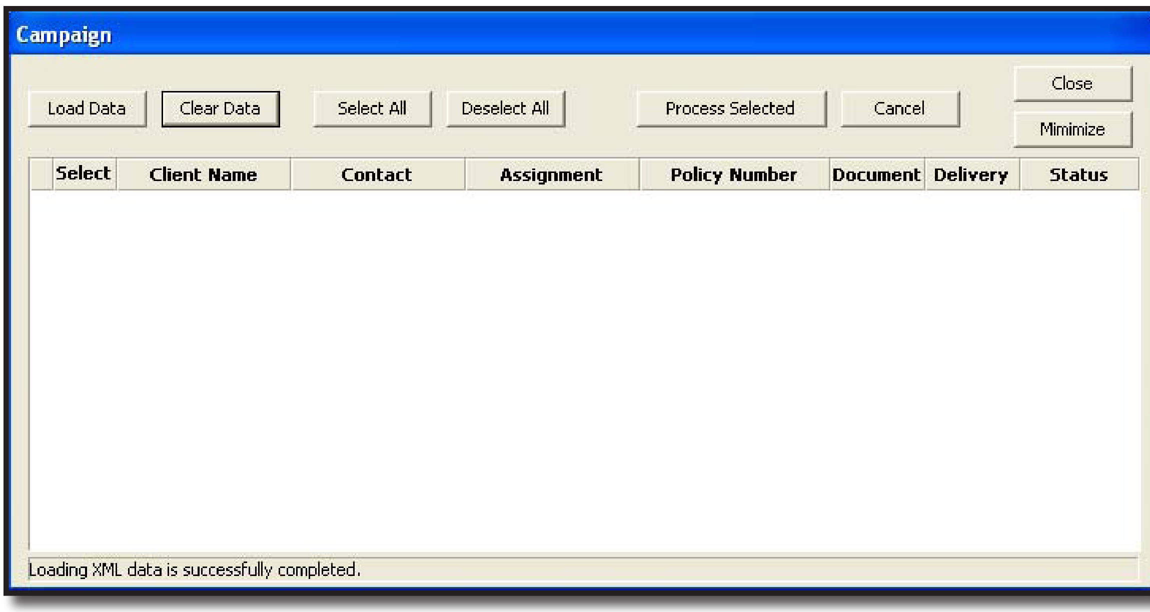
Clicking the **Next** button on step 3 will bring up the final step. This step shows a summary of choices made in steps 1 through 3. Click the Back button to go back to the prior screens if any changes are necessary. Any classifieds and Actions included in the Campaign will begin being added to the client records when the **Finish** button is selected.



Launching the Campaign

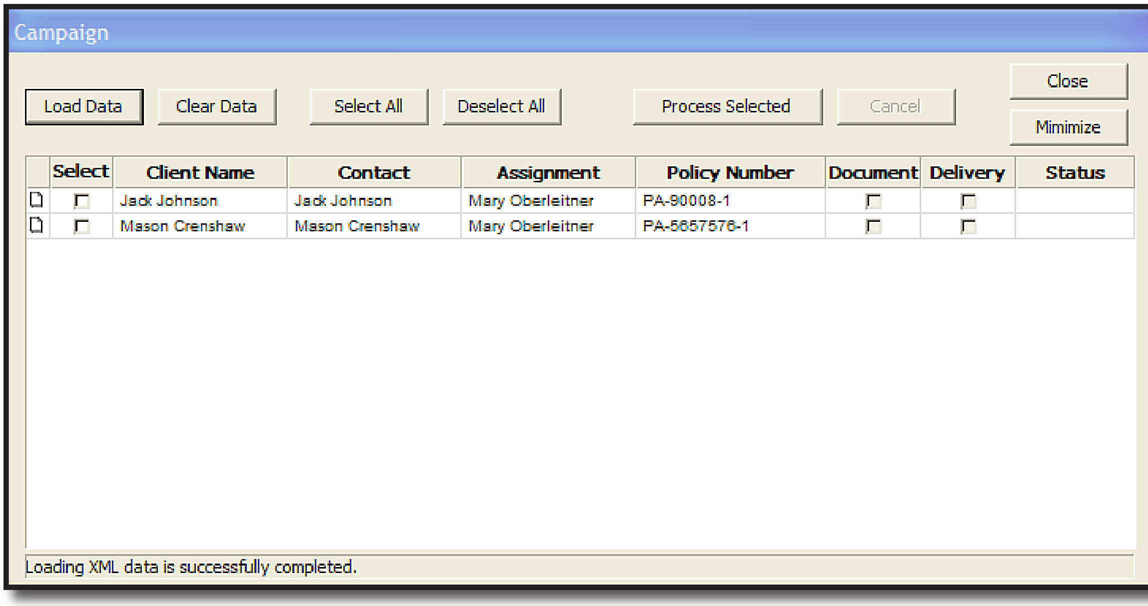
To launch the Campaign, right-click the **Nexsure Agent** icon located on the Windows taskbar to bring up the menu.

Click on Campaign to launch the Campaign window.

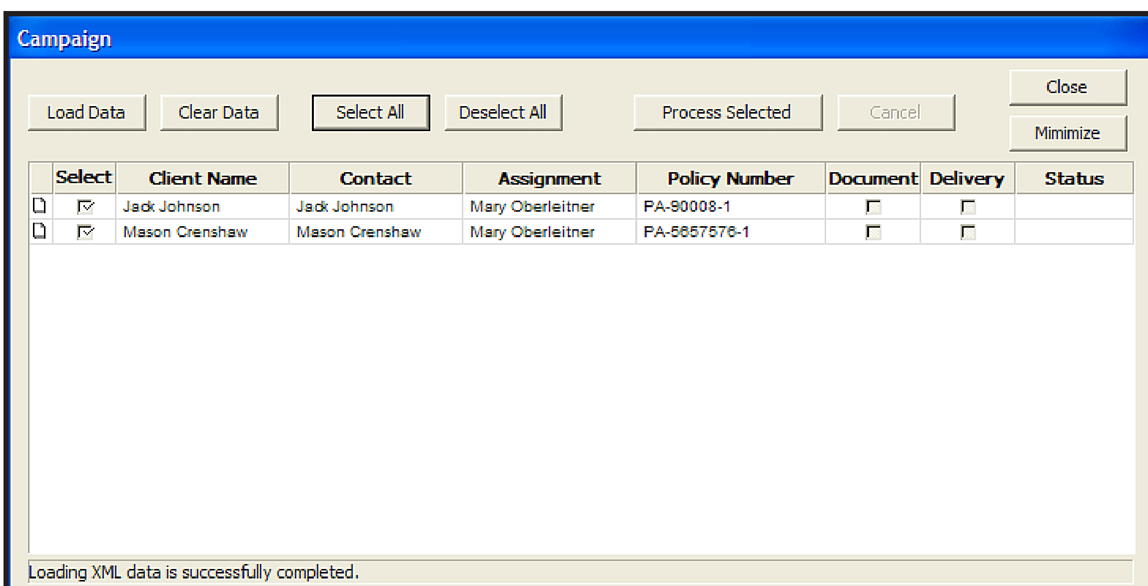


Click the **Load Data** button to bring the data gathered in the **Campaign Wizard** into the Campaign window.

In this Campaign example 2, clients were found meeting the coverage rounding report criteria. Keep in mind that if the coverage rounding report finds multiple matches on the same client that the client will appear in the list multiple times.



Select only those clients you wish to send the campaign to by placing a check in the box beside the client name. To select all, click the **Select All** button and the **Deselect All** button to unselect all. If you navigate elsewhere during the process the window can be brought up again by right clicking on the Nexsure agent. The screen does not minimize to the taskbar when not in use. So, clicking the **Minimize** button or outside the window will require right clicking on the Nexsure Agent to bring up the campaign window. To remove the data from the campaign window to process the campaign later, click the **Close** button from the campaign window. The data can be brought back into the campaign window by launching the campaign again and clicking the **Load Data** button.



After selecting the client's policies to include in the Campaign, click the **Process Selected** button to bring up the **Output Campaign Wizard** screen. Since this is not part of the **Campaign Wizard** run from the **Coverage Rounding** report, it is possible not to process the entire campaign at once due to staffing limitations. Therefore, it may be prudent to limit the process to 100 letters per day or per week, etc. to limit the amount of processing time.

To begin merging the templates, some choices will need to be made on the **Output Campaign Wizard** screen. In order to attach the document templates to the client's record, the **Attach Microsoft Word document to client attachment** option is automatically selected. If the documents are to be reviewed and printed individually do not select any other options, just the **OK** button to begin merging and adding the documents to the client's record. Once the documents have been added, they may be edited and printed individually. If someone else is to do the editing and printing, they may use the Actions from the **Home Action** screen to locate the clients or if using classifieds, use the search screen to locate.

If the document is ready to merge, add to client's record and print, also select the **Printer** option and choose the printer from the drop-down box to the right of the option. Click the **OK** button to begin the merge, add the document to the client's record and begin printing.

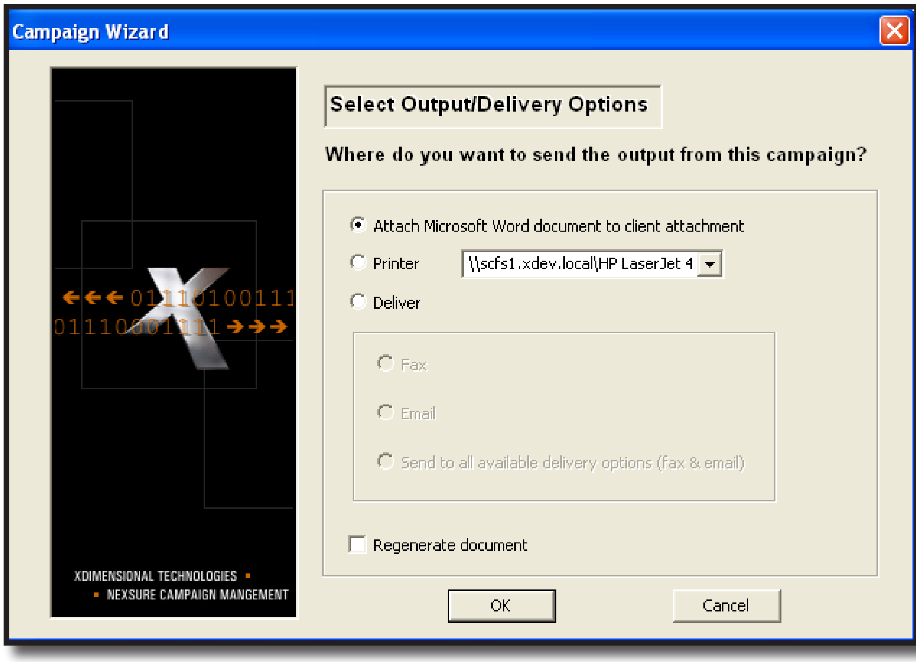
If delivering via Nexsure instead, click the **Deliver** option. Documents may be delivered via fax or email or all available delivery options added to the contact record.

If **Fax** is selected, make sure that the first fax number entered for the selected contact is correct as this is the number that will be used for delivery.

If **Email** is selected, make sure that the first email address field for the selected contact is correct as this is the number that will be used for the delivery.

If you are unsure if the fax and email fields have been completed consistently, and want to be sure the contact receives the document select the third option to deliver by both fax and email. This way the client will receive the message if at least one of these fields is populated accurately.

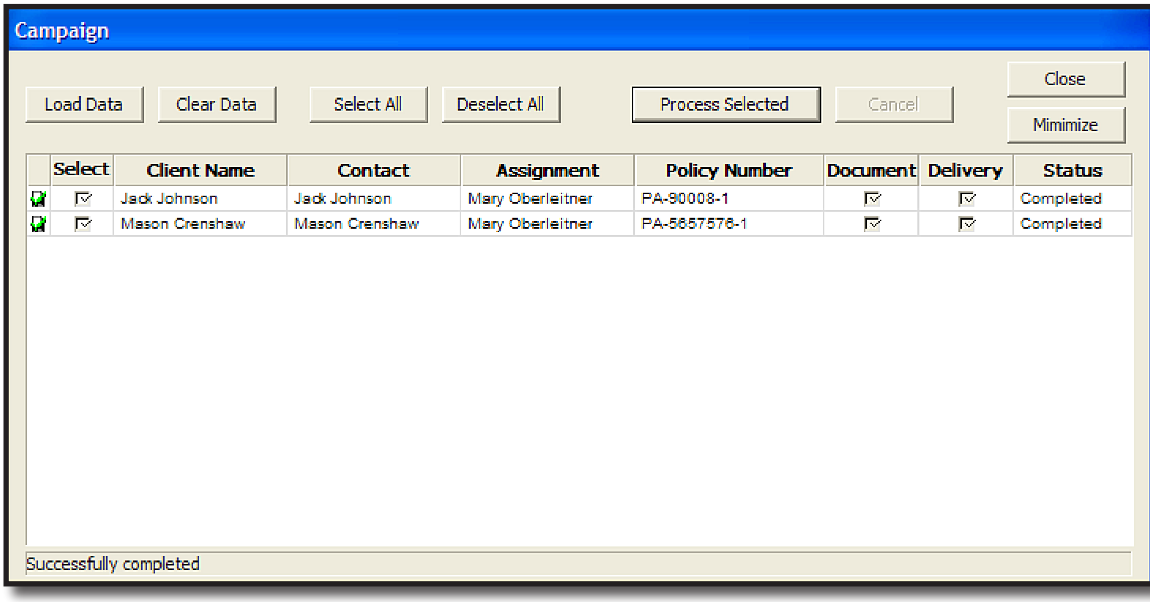
Click the **OK** button to begin the process.



If after merging the document you find a problem with the template, you can choose to regenerate the document again by selecting the **Regenerate document** option. However, make sure to update the template prior to regenerating. Choosing to regenerate will merge the template, attach to client's record and print or deliver.

Note: Keep in mind that once the merging process begins that the entire field merging process and creation of the document from the template will take place during this time. It is recommended to run the campaign from a non-primary workstation if a large campaign is being processed.

Once the documents have been processed a green check is placed to the left of the **Select** box and a **Status** of **Completed** is added in the **Status** column.

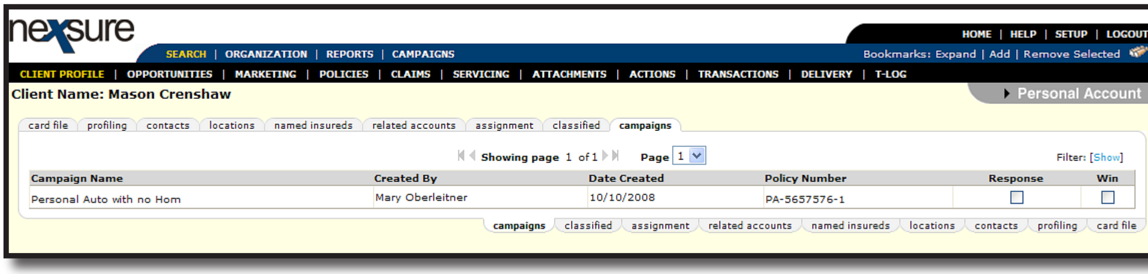


Caution: If splitting up the Campaign to complete later, do not click the **Clear Data** button as this will remove the **Status** and completed check box indicator leaving no way to identify which clients letters have already been submitted to. However, if this should occur, an action or classified report may be run to determine which clients the campaign was sent to, providing the **Classified** was unique to the Campaign.

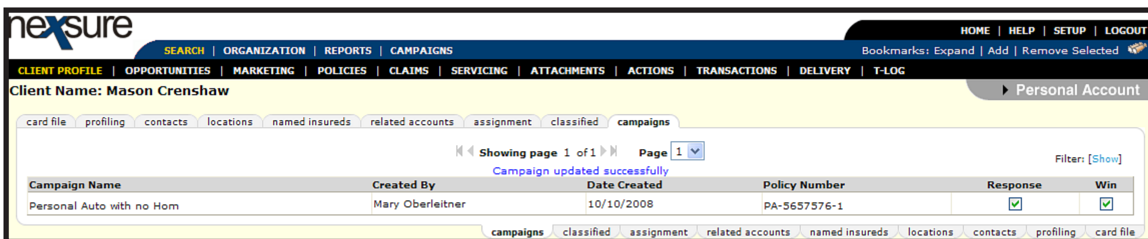
Notes

Goal Tracking

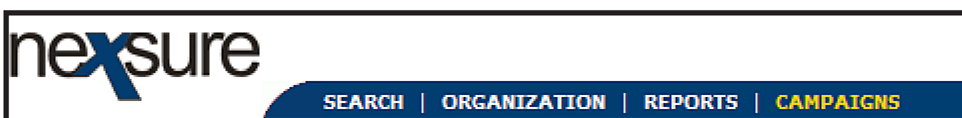
As clients respond to the Campaign, make sure to keep track of each client's response. After clicking the **Client Profile** link on the **Client** menu, click the **campaigns** tab.



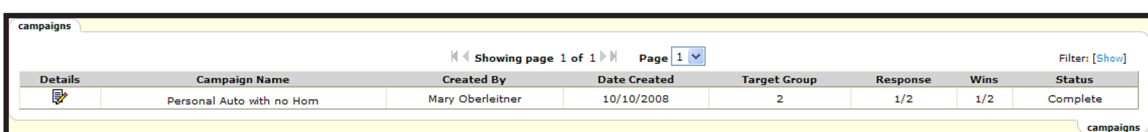
If the client responded to the Campaign, place a check in the **Response** field and if they responded positively place a check in the **Win** box. These checks are automatically saved and calculated and added to the Campaigns located on the **Primary** menu.



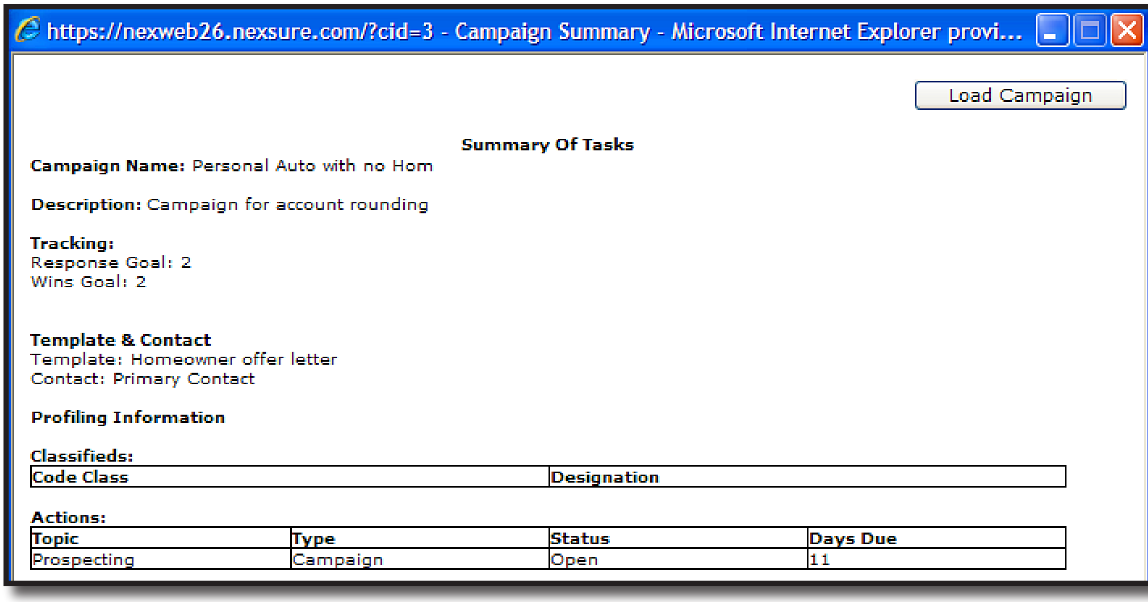
To see the results of the Campaign, click Campaigns on the Primary menu.



On the **Campaign Summary** Screen, the goal and the number of responses and wins are displayed so you can quickly see where you are on the current campaign. Use the **[Show]** link to search for campaigns as necessary.



Clicking the **Details** icon of the Campaign reveals the details. The details include goal tracking, template and contact information as well as classifieds and actions used in the campaign. Should the campaign time limit be exceeded, click the **Load Campaign** button to load the data again. After clicking the **Load Campaign** button, right-click the **Nexsure Agent** icon in the taskbar and select **Campaigns** and then the **Load Data** button. Any previously processed client policies are marked as completed as long as the **Clear Data** button was not selected. Complete the process as indicated earlier in this chapter.


https://nexweb26.nexsure.com/?cid=3 - Campaign Summary - Microsoft Internet Explorer provi...

Load Campaign

Summary Of Tasks

Campaign Name: Personal Auto with no Hom

Description: Campaign for account rounding

Tracking:
Response Goal: 2
Wins Goal: 2

Template & Contact
Template: Homeowner offer letter
Contact: Primary Contact

Profiling Information

Classifieds:

Code Class	Designation

Actions:

Topic	Type	Status	Days Due
Prospecting	Campaign	Open	11

Notes