Silverbear 365

UCI – Sales, Marketing and Fundraising Course – Marketing Module

Empowered Association™

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Approval

Approver	
Date of latest approval by Management	

Version History

Version	Date	Author	Change Details	Reviewed by
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Video

Video guide available	Video URL	Last updated

1. Guide Purpose and Usage

GUIDE PURPOSE

- To accompany the Silverbear Sales, Marketing & Fundraising course marketing module
- To give a strong grounding in marketing functions on Silverbear

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INCLUDED

- Explanation of marketing lists functions and how to create and manage lists
- Use of Quick Campaigns
- Campaign creation, distribution and monitoring

PREREQUESITE MODULES	RECOMMENDED PREVIOUS MODULES	RECOMMENDED FOLLOW UP MODULES
Silverbear Fundamentals– Introductory Silverbear Fundamentals – Intermediate – Advanced finds are covered in this module and are an essential skill for the Marketing module Contacts and Organisations – Introductory	Memberships Subscriptions and products – Introductory Events – Introductory and Intermediate	Sales, Marketing and Fundraising – Leads & Opportunities and Fundraising modules

TRAINING TASKS

You should have been advised which environment (e.g. UAT) you should use for your practice tasks. If you are unsure, please ask your internal CRM administration team who will contact Silverbear if necessary.

FEEDBACK

If you have any feedback on any of the instructions or screen shots please email susannah.patrick@silverbear.com

1. Guide Purpose and Usage

Please note that due to the customised nature of Silverbear Membership some screens in this guide may appear different to the ones shown in your Silverbear environment.

1. Introduction to Silverbear marketing

Silverbear allows you to create targeted customer lists based on your particular campaign requirements. A Marketing List can be based on any combination of information you hold on your clients. For example, you can search by demographics, by membership or purchases, by event bookings, or by pre-defined segmentation.

Certain Marketing Lists can also be compiled or amended manually, by adding or removing individual contacts.

Marketing Lists can be used for bulk email campaigns, and also migrated into third party bulk emailing software and text-based marketing solutions or postal or telephone campaigns.

If you use the Dotdigital email marketing platform this solution can be embedded into the CRM to work seamlessly with your data. Please note that training on this solution is provided by your Dotdigital supplier and is not covered in this guide.

2. Types of marketing lists – dynamic and static

Marketing lists on Silverbear can be one of two types: Dynamic or Static.

Static lists are compiled through a combination of advanced finds and manual addition of records. Any changes or updates to the list need to be carried out manually.

Dynamic lists update automatically. Once the criteria is created, records will be added or removed by the CRM if they meet or no longer meet that criteria. For example, if you had a dynamic marketing list made up of contacts who hold an active membership with you, any contact who cancelled their membership would be automatically removed from that list.

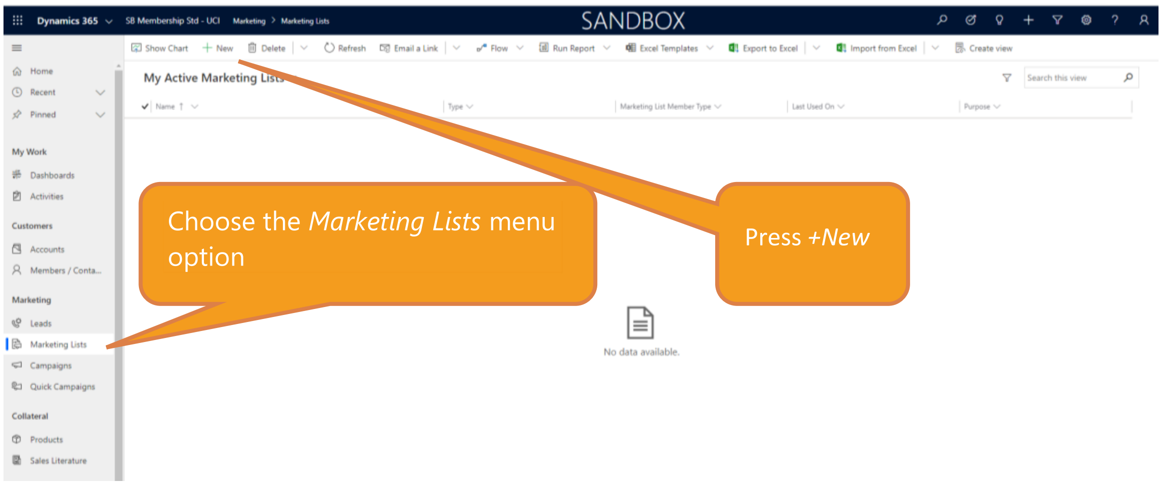
Dynamic lists are very useful if you run the same campaigns or member communications regularly. Dynamic lists can be converted into static lists, however static lists cannot be converted into dynamic lists.

Both types of list however can be “locked” so that changes to them cannot be made.

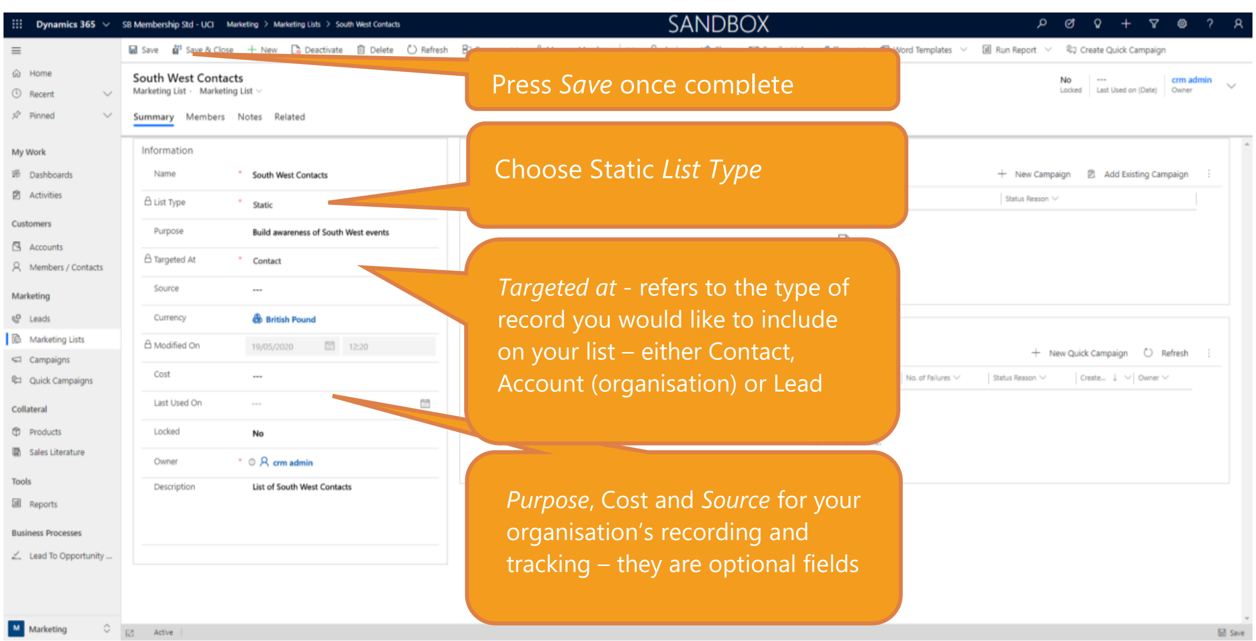
3. Creating a static Marketing List

In the example below we create a list of contacts who live in a particular region, in order to invite them to an event. As it is a static list, we are also going to manually add some additional members.

- Choose the *Marketing* Work Area, and then the *Marketing Lists* menu option and press +*New*



- Enter the basic details for the list as below and make sure your list type is set to *Static*

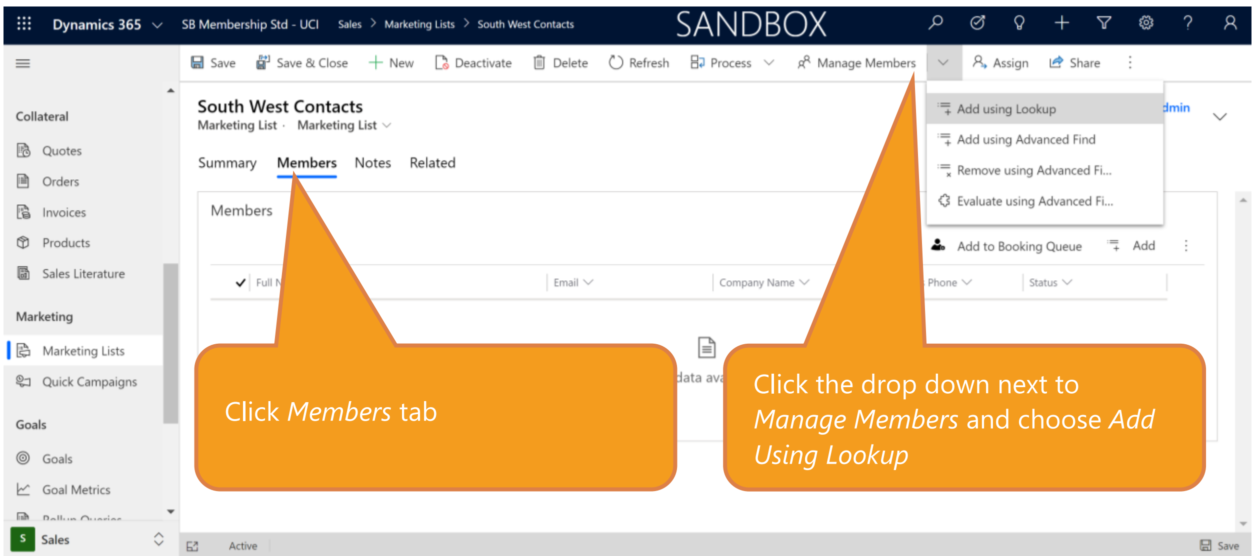


4. Adding contacts to a static list.

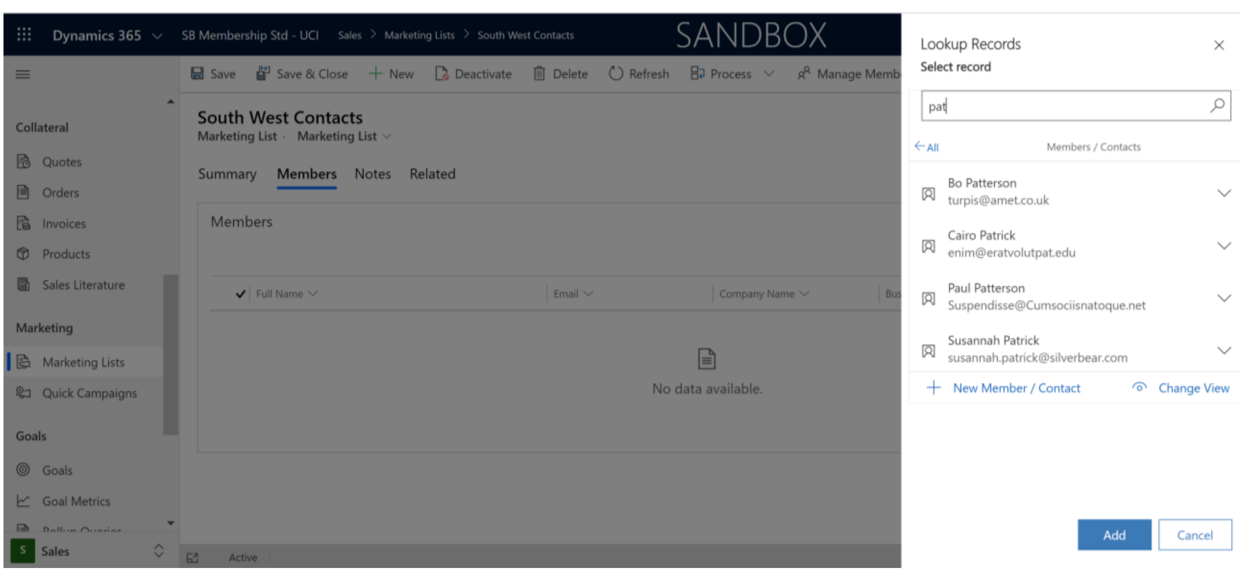
Contacts can be added manually or through use of the Advanced Find. After creating a Marketing List, the next step is to search for contacts to include.

4.1. Adding contacts manually on Marketing List screens

- On your Marketing List screen click on the *Members* tab
- Click the drop down arrow next to *Manage Members* and choose *Add Using Lookup*

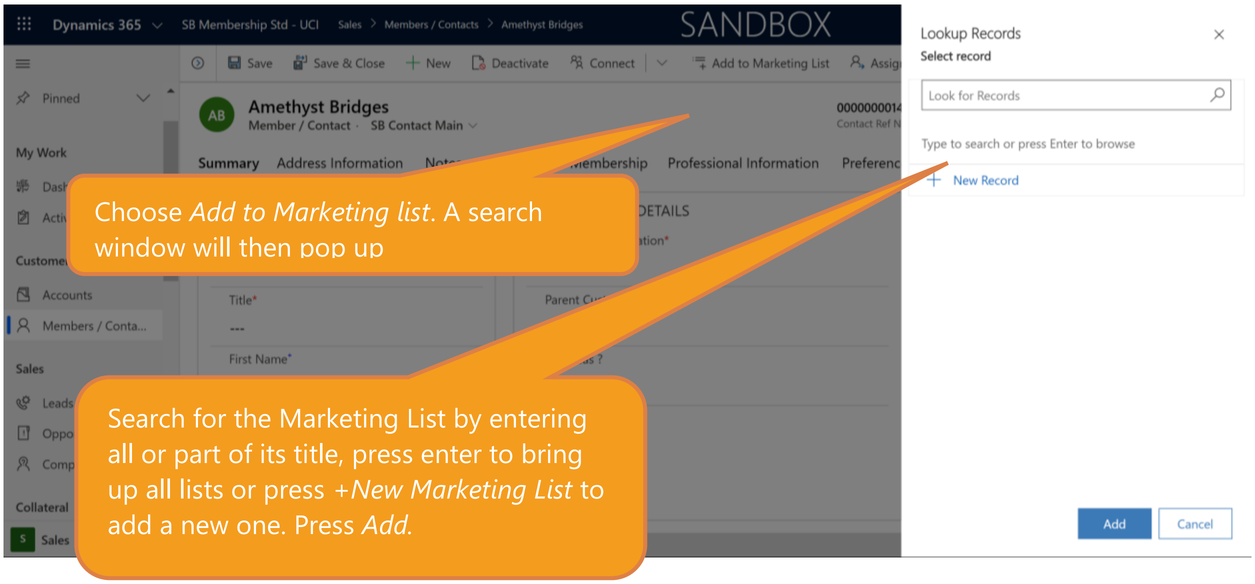


- After choosing *Add Using Lookup*, a lookup records window appears where you can search for and select contacts or add new ones.



4.2. Adding contacts manually on contact record card

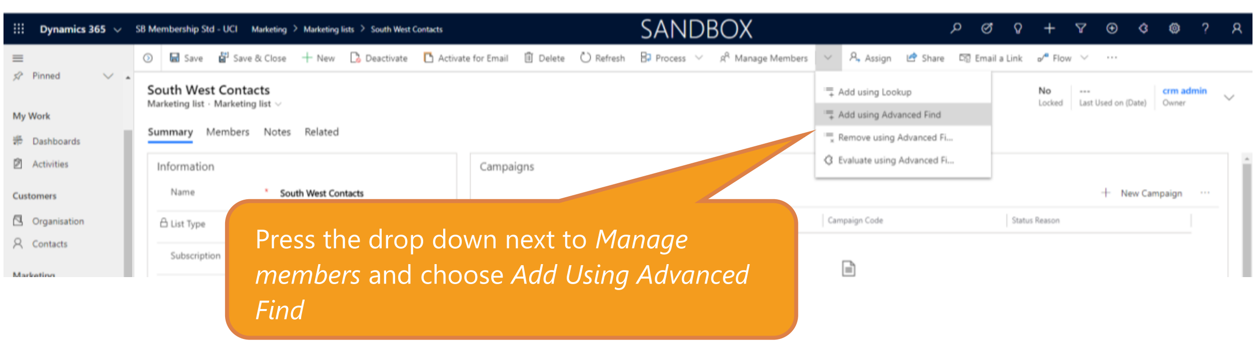
- Find your contact, open their record card and click *Add to Marketing List* on the *Command Bar*



5. Add to a Marketing List using Advanced Find.

Advanced finds are covered in further detail in the Silverbear Fundamentals Intermediate course. Advanced Find allows you to search your CRM database for records which meet a specific criteria; you can then use the results in a number of different ways, including adding them to Marketing Lists.

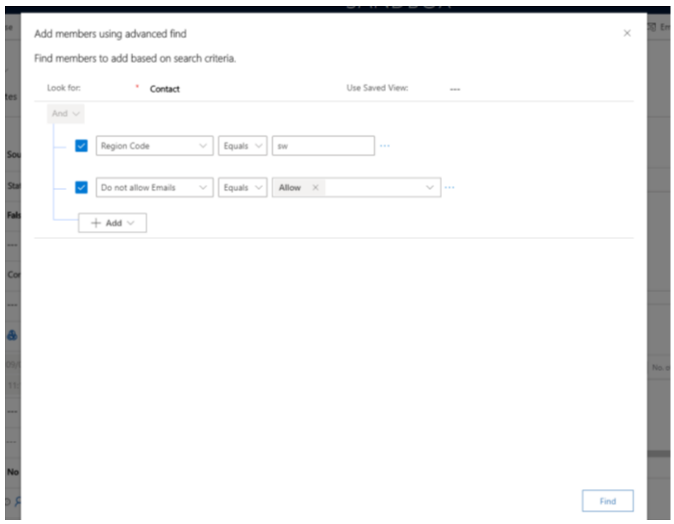
- To work with an Advanced Find, click the drop down next to *Manage Members* and choose *Add Using Advanced Find*



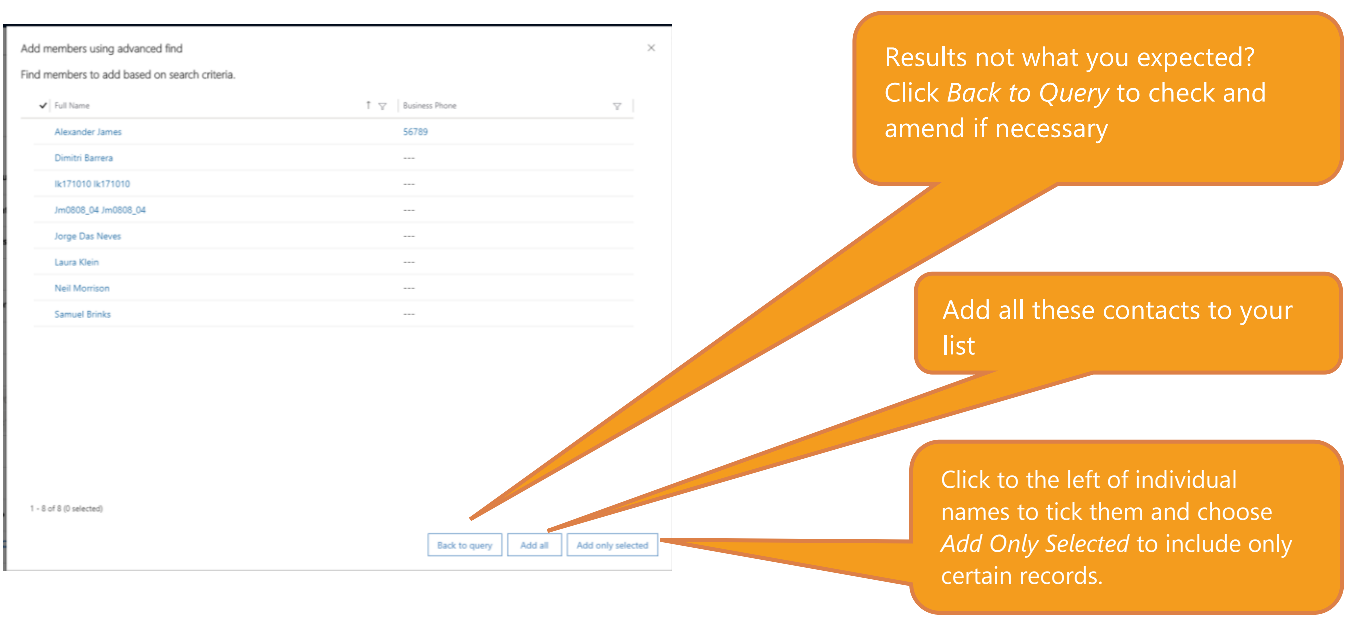
- An Advanced Find window will pop up (this is styled slightly differently to the standard Advanced Find, but its functionality is still the same). You can use this window to create your search criteria or, if you have previously created your criteria and saved it, you can use the *Use Saved View* option instead

5.1. Creating a new Advanced Find

- For this list, we have searched by *Region Code* as we are targeting South West members.

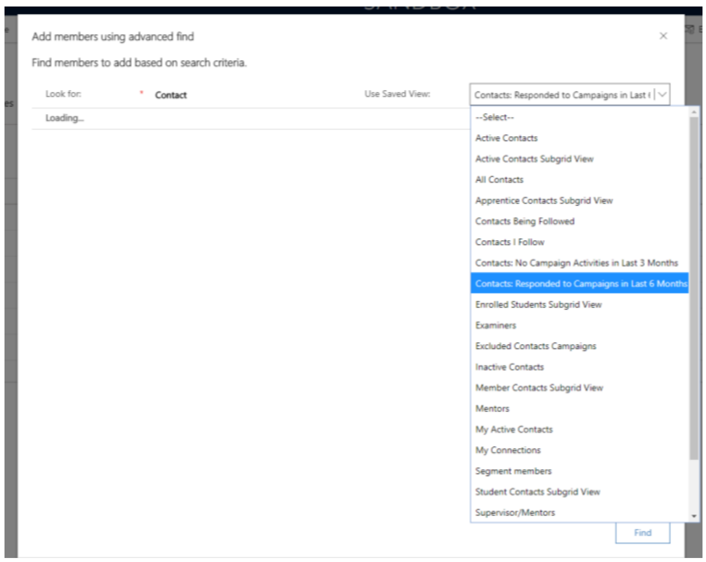


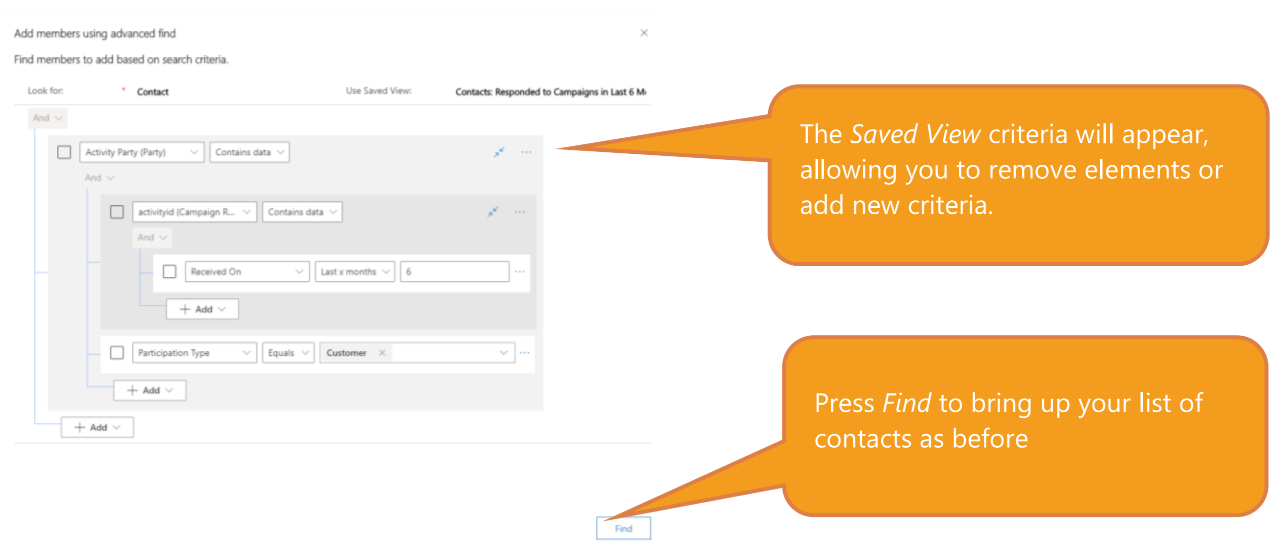
- Your Advanced Find can of course be far more detailed than this and use a combination of different fields. For example, you could search by membership type, subscription purchase or event attendance. Once you have built your search criteria, press *Find*.



5.2. Using a previously saved Advanced Find (a Saved View)

- If you have previously used Advanced Find for this mailing list and saved that search as a *Saved View* you will be able to use that instead of creating a new search. Alternatively, you might want to use one of the default *Saved Views*. Please note that the only Saved Views which will be displayed are ones that relate to the type of record you are searching for. In our example below we can only see Contact Saved Views. If your Mailing List consists of Accounts (organisations) you will only see *Saved Views* for Accounts.

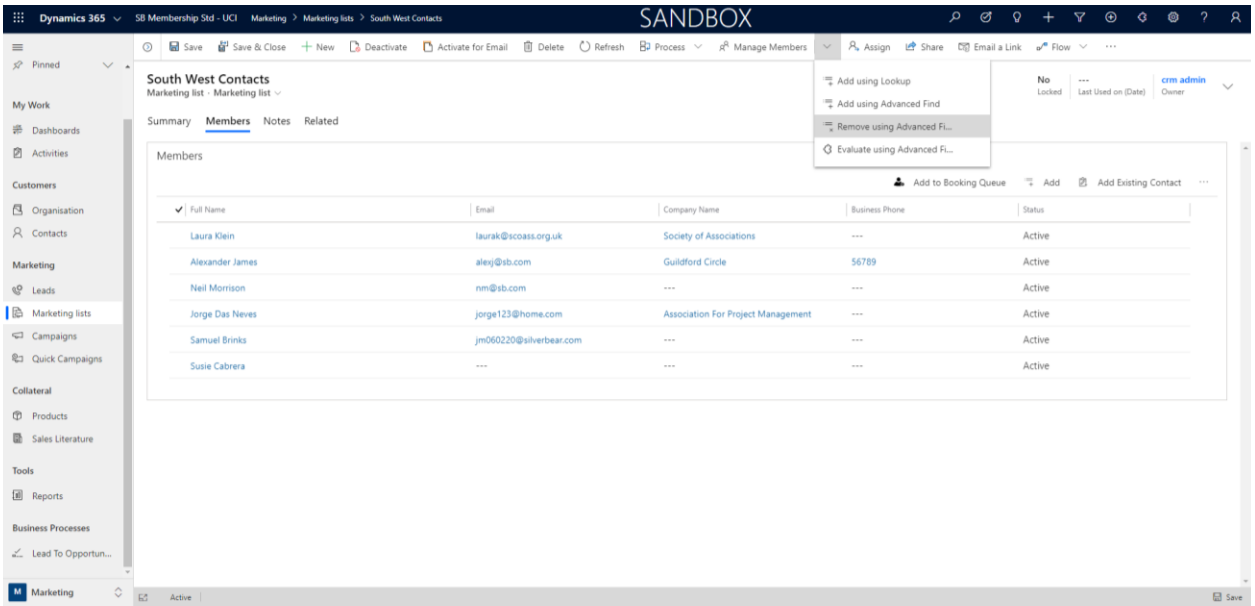


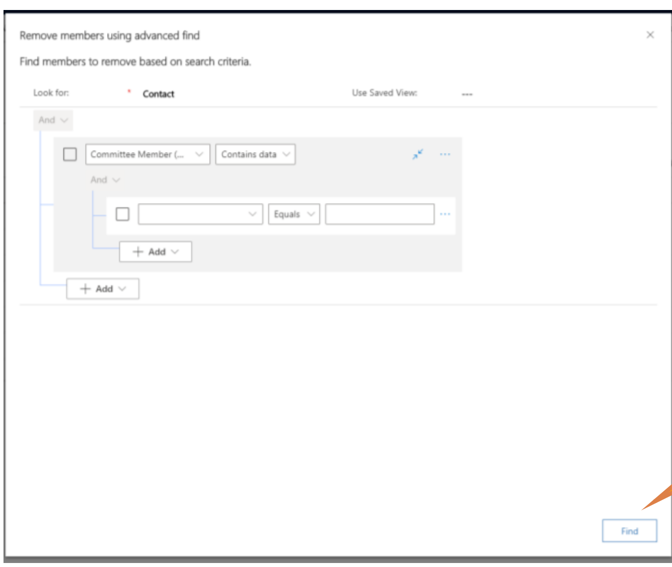


6. Removing members using the Advanced Find

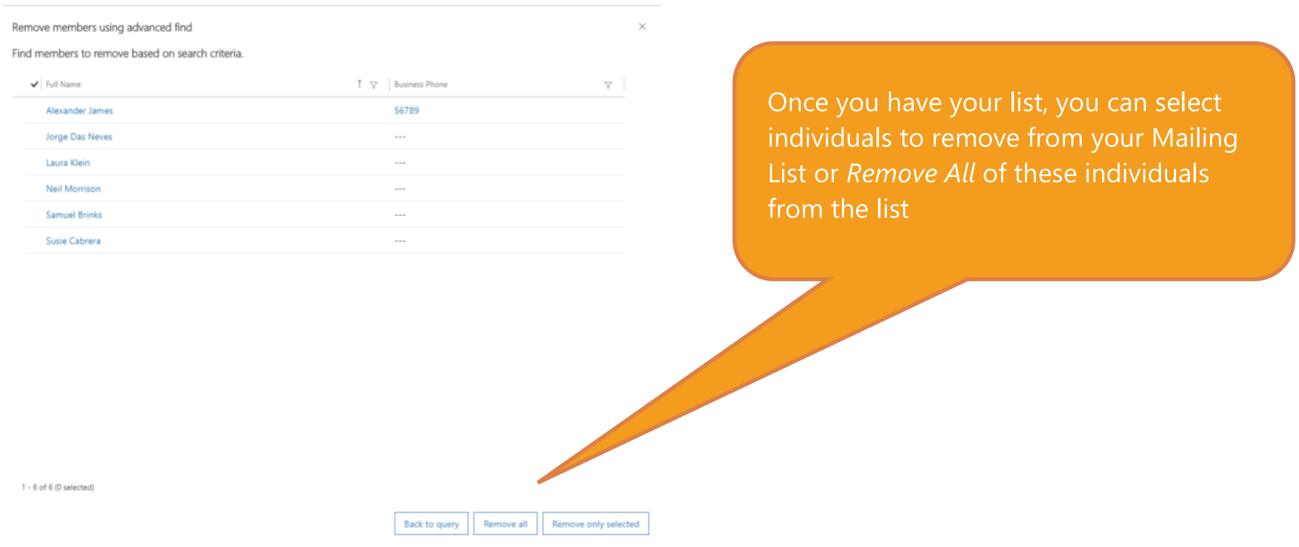
In this circumstance you have created a Marketing List but wish to remove a certain set of contacts from it. For example, in our South West list we would like to remove any members who have already part of a committee.

- First, make sure that you are viewing the correct Marketing List then choose the *Members* tab and select *Remove Using Advanced Find.*





Build your query and press *find*. In this case we used the *Related Entity* Option. Please see Silverbear Fundamentals – Intermediate Module for more information on building Advanced Finds



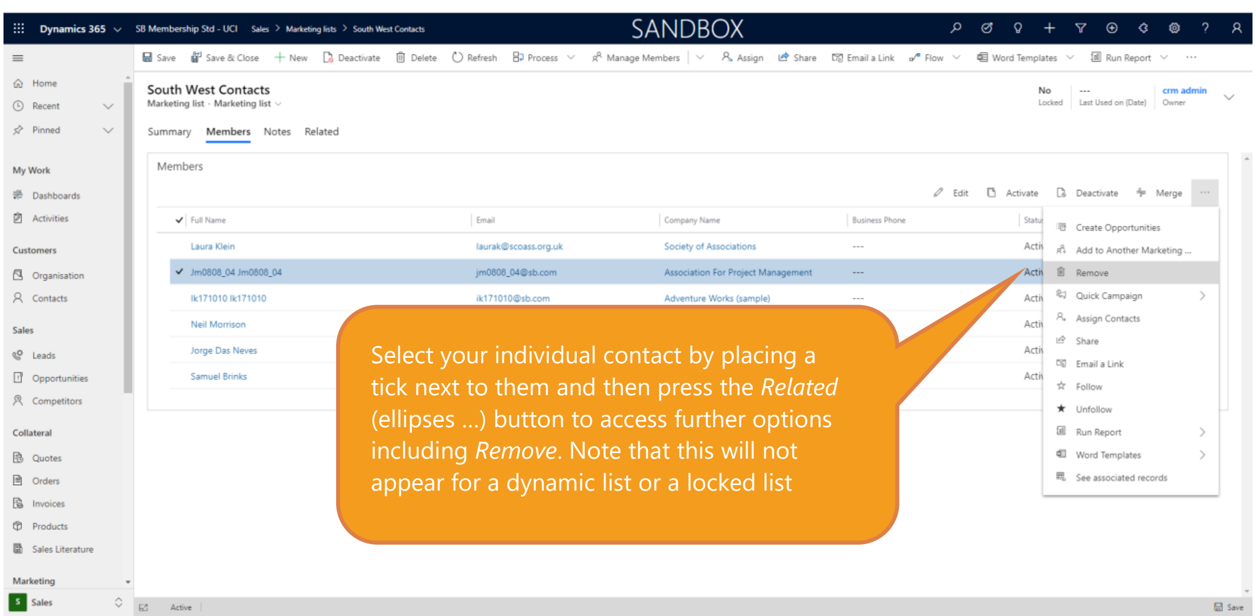
7. Removing selected contacts from Marketing Lists

Individual contacts can be removed from Marketing Lists either in the Marketing Lists record, or via the individual contact record.

7.1. Removing Contacts through the Marketing List record

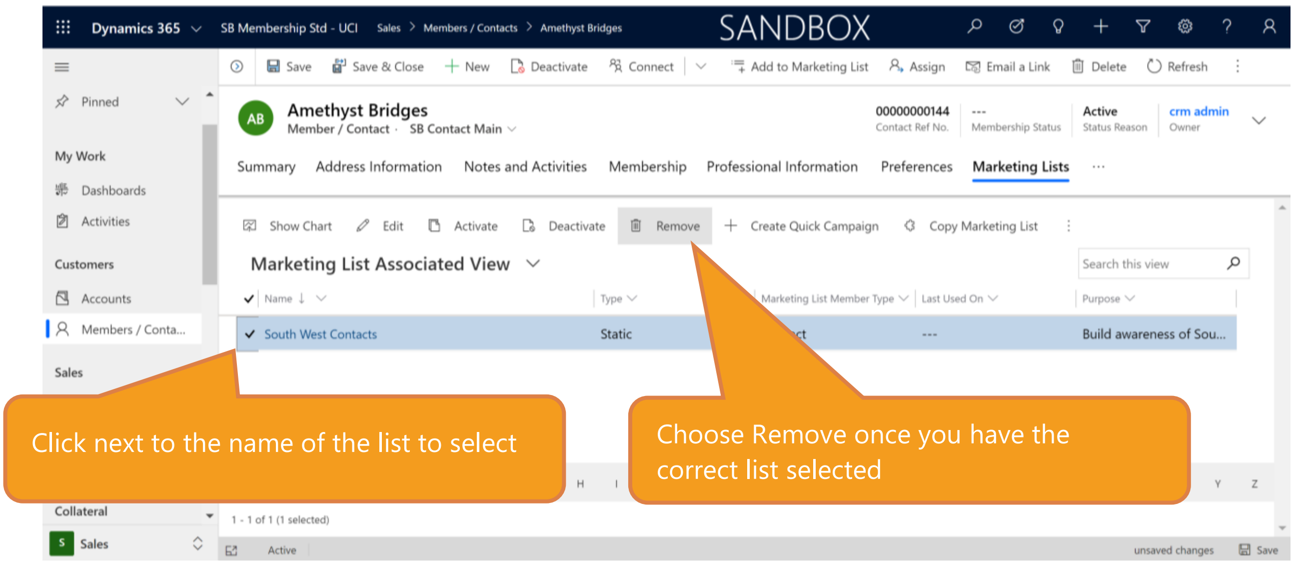
First search for the correct marketing list. (usually through the Marketing Work Area and then Marketing Lists menu option), then click on the required list.

Press the Members tab. Press to the left of the contact(s) you wish to remove to tick them and then press the *more* or *ellipses* option above the grid of members. Choose *Remove* to take them off your marketing list.



7.2. Viewing and editing an individual's Marketing List memberships from the contact card

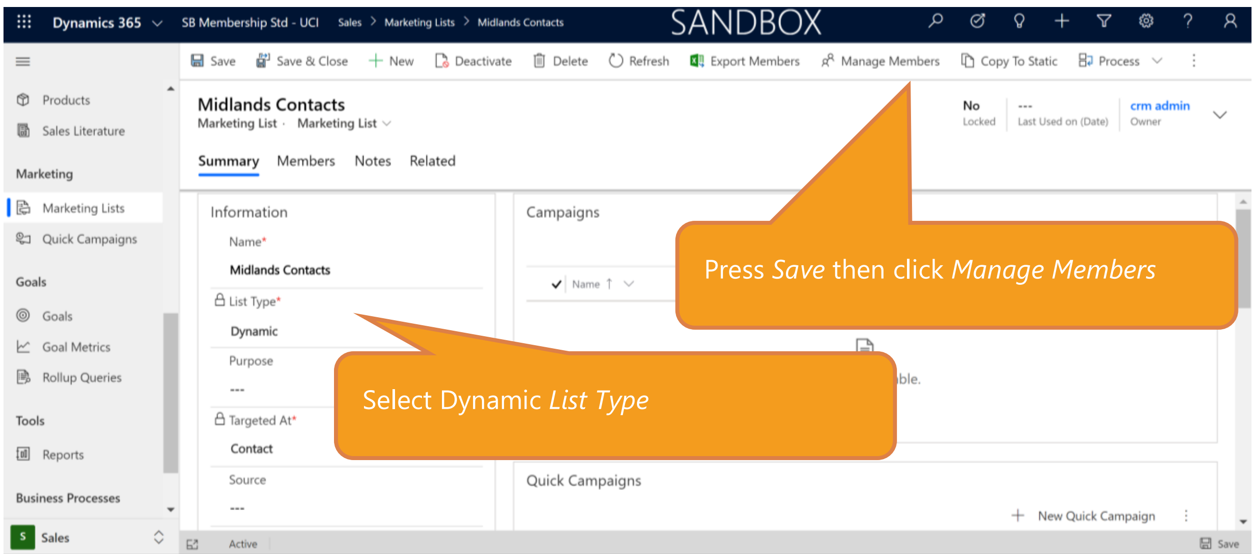
- To view the *Marketing List*(s) on which a contact appears, search for their record card in the normal way and once you have accessed it, choose *Related (...)* and then *Marketing Lists*
- To remove the contact from a marketing list they appear on, click to the left of the name of the list (to put a tick against it) and choose Remove. You can also add your contact to marketing lists from this screen.



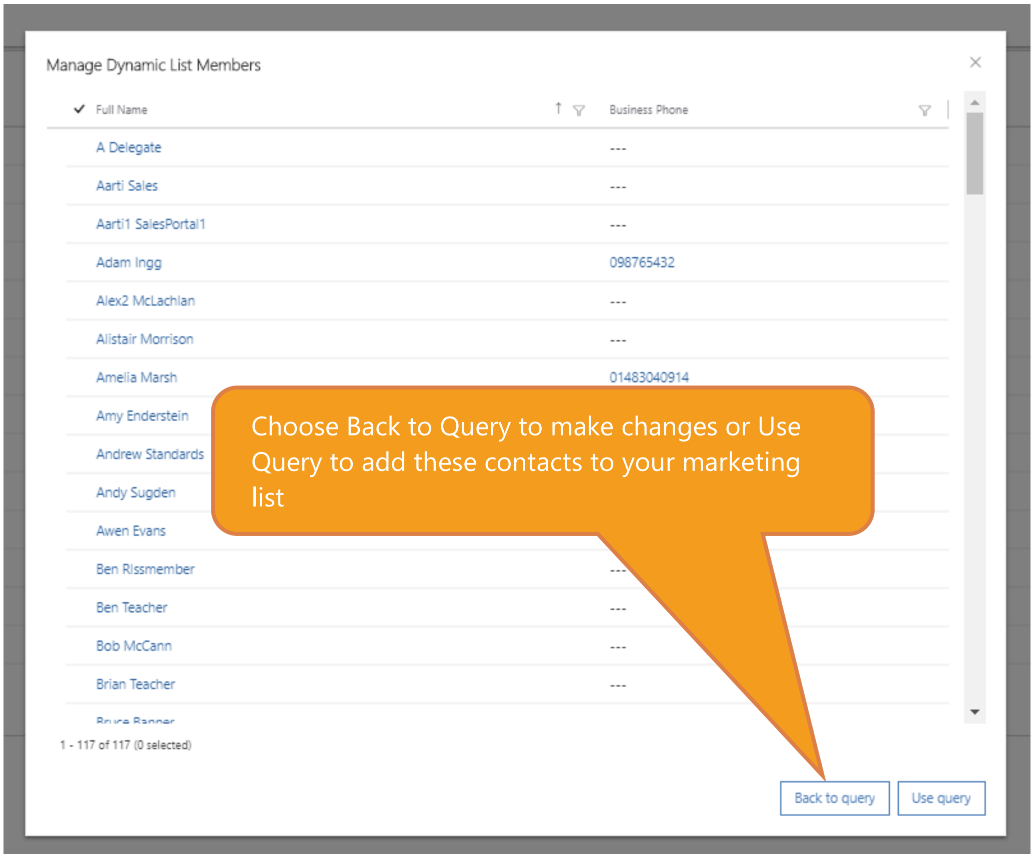
8. Dynamic Marketing Lists

When you create a dynamic Marketing list you will not be given the option to add contacts individually (although if you convert your dynamic list to a static one you will have that opportunity). A dynamic list updates with your data. For example, in this scenario we have created a marketing list for contacts with email addresses who live in the region code South and who have not opted out of email contact. The membership of this group will change as your contacts change address and/or their contact preferences and also as new contacts are added to your system.

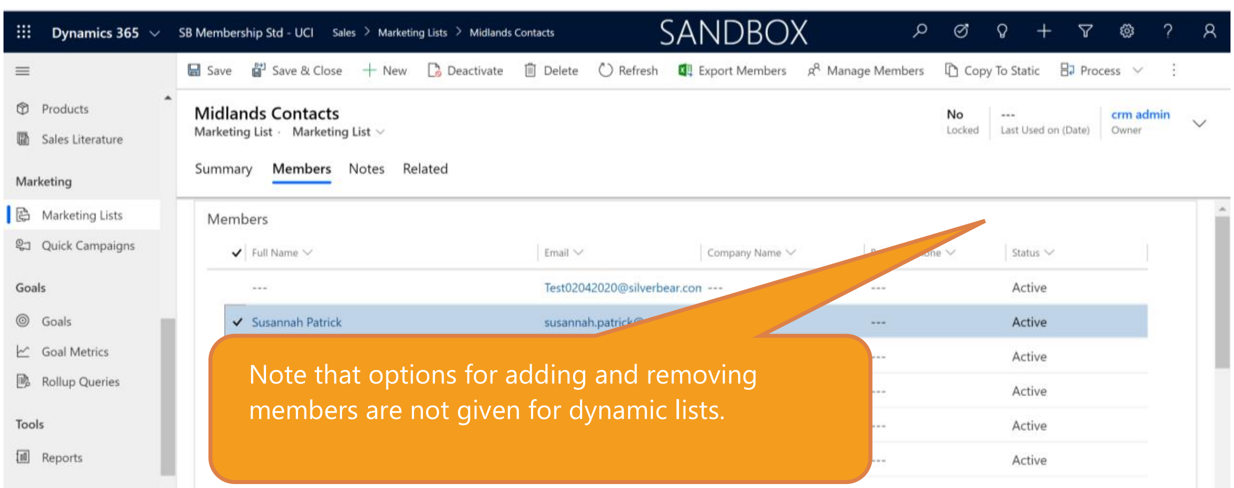
- To create a dynamic list, follow the same process as for static lists, but change the list type to Dynamic
- Click Manage Members

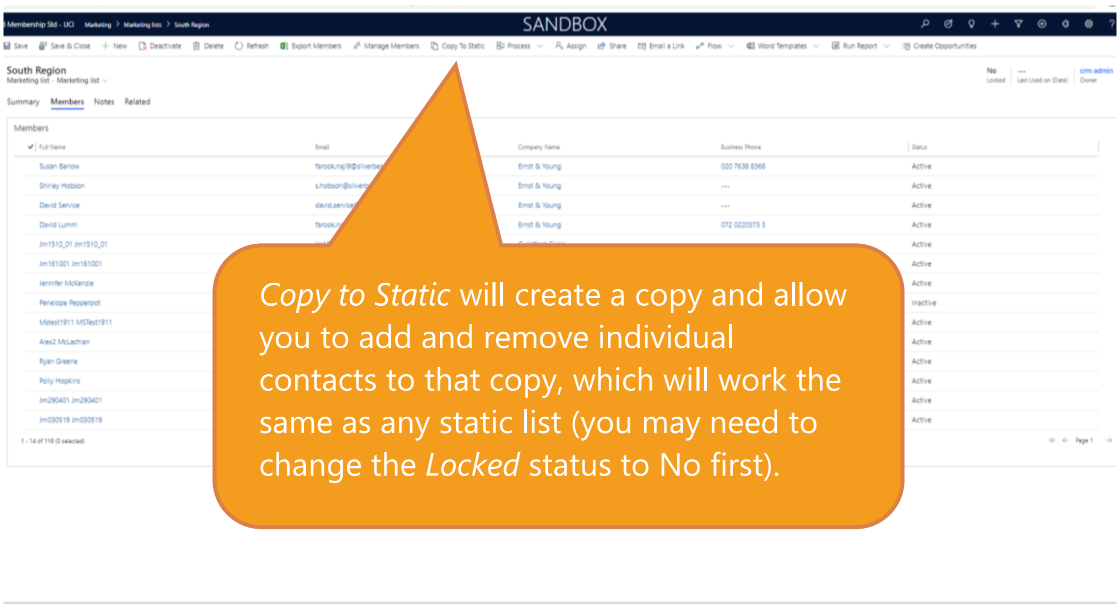


- You will be shown a Manage Dynamic List Members – which has the same functionality as Advanced Find. You can build a query yourself or used a Saved View. In this scenario we have created a new search. This functionality is the same as with a Static List as described earlier in this module
- Once you have built your query, press Find.
- Unlike with a Static Marketing list, you are not able to pick and choose which contacts to add to your list; instead you are confirming if you want to use the query to look for members to add to your list, or if you want to adjust your criteria.



- You will not be able to add or remove members manually; members are added to the list if they fulfil the criteria you have set. You can however adjust and update your criteria by clicking on *Manage Members* again. You can also make a static copy of the list if you choose.



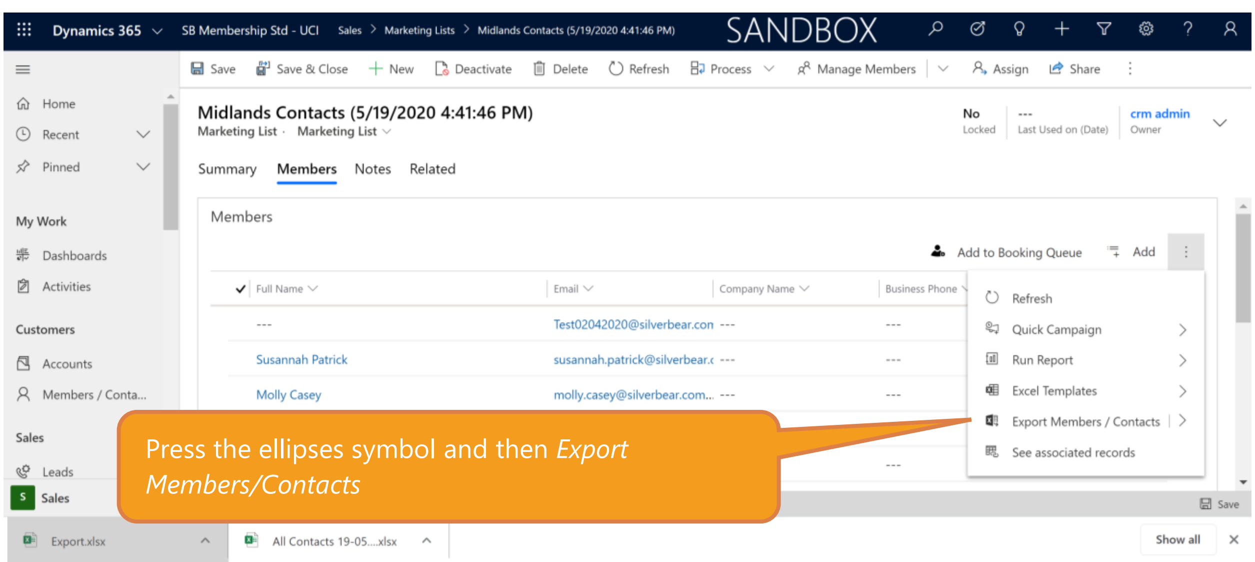


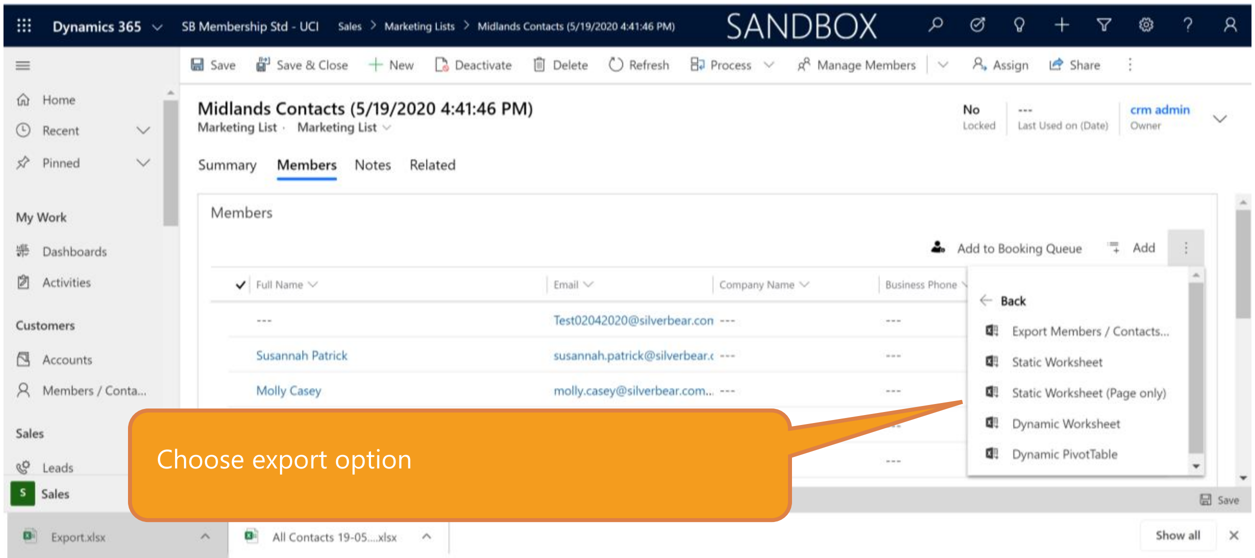
9. Working with Marketing Lists – next steps

Marketing Lists can be used in a number of different ways, the most common next steps are exporting to Excel, using in a marketing solution such as Dotdigital or working with Quick Campaigns and Campaigns in CRM.

10. Exporting to Excel

- On your Marketing List, click on the Members tab
- Press the Ellipses (or…) on the top right of the list of members
- Choose Export Members/Contacts

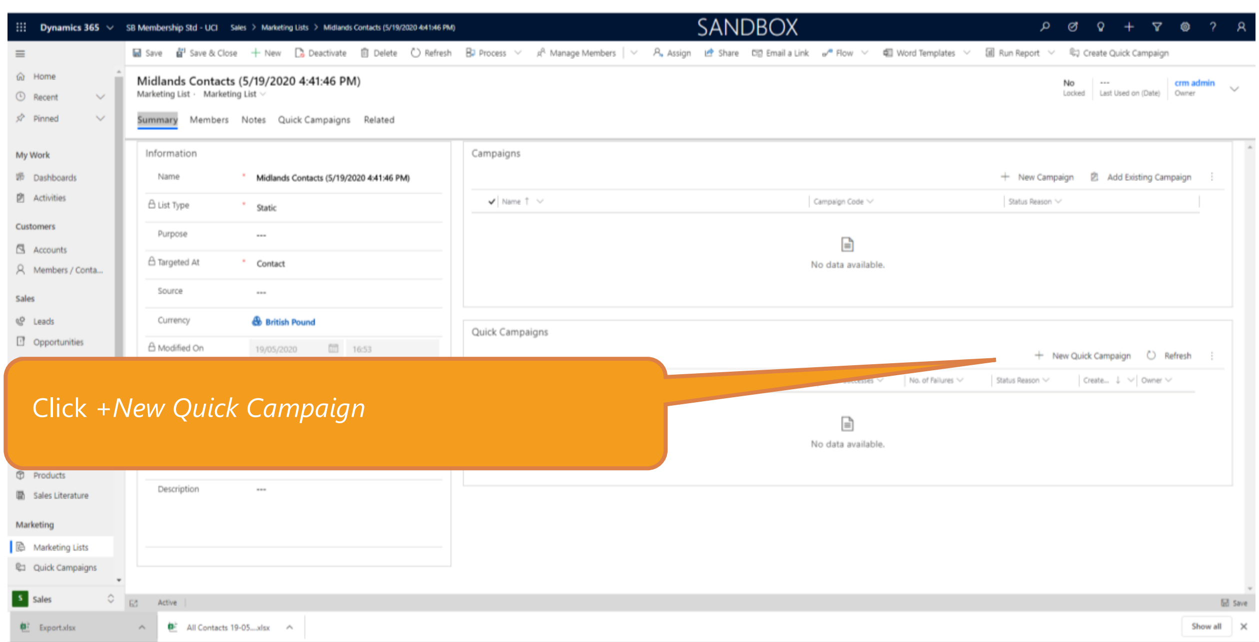




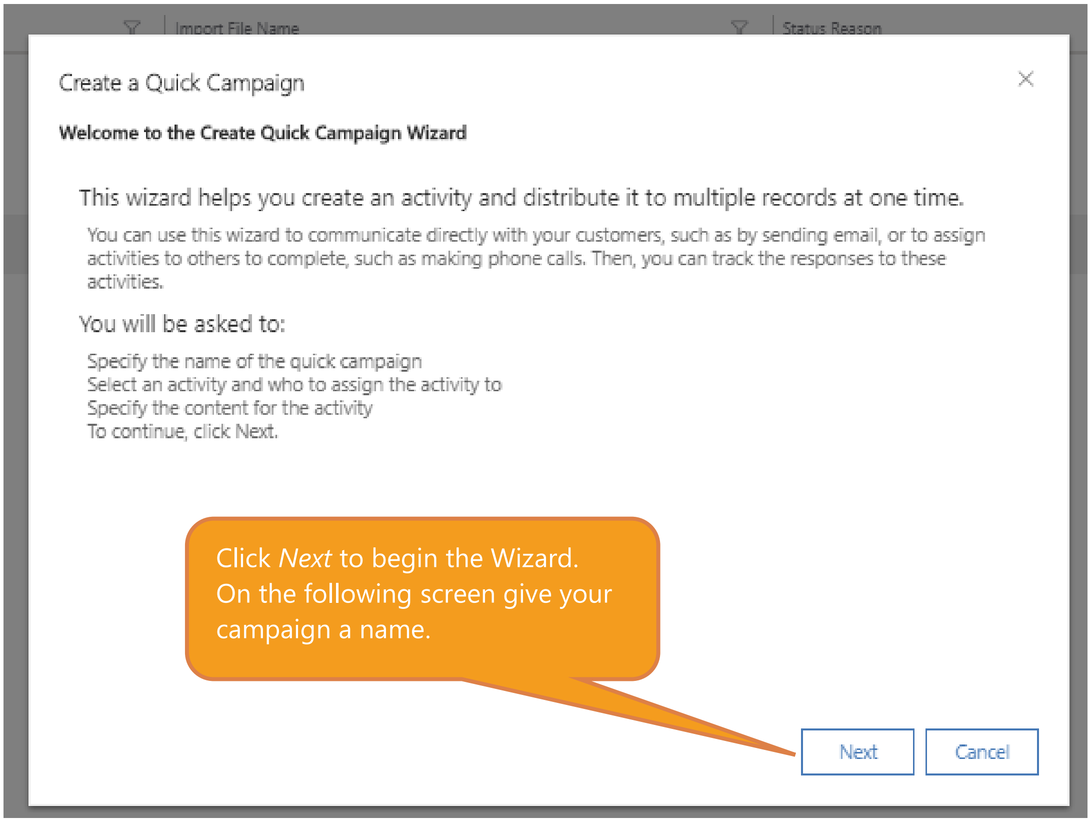
11. Quick campaigns and Campaigns – an overview and comparison

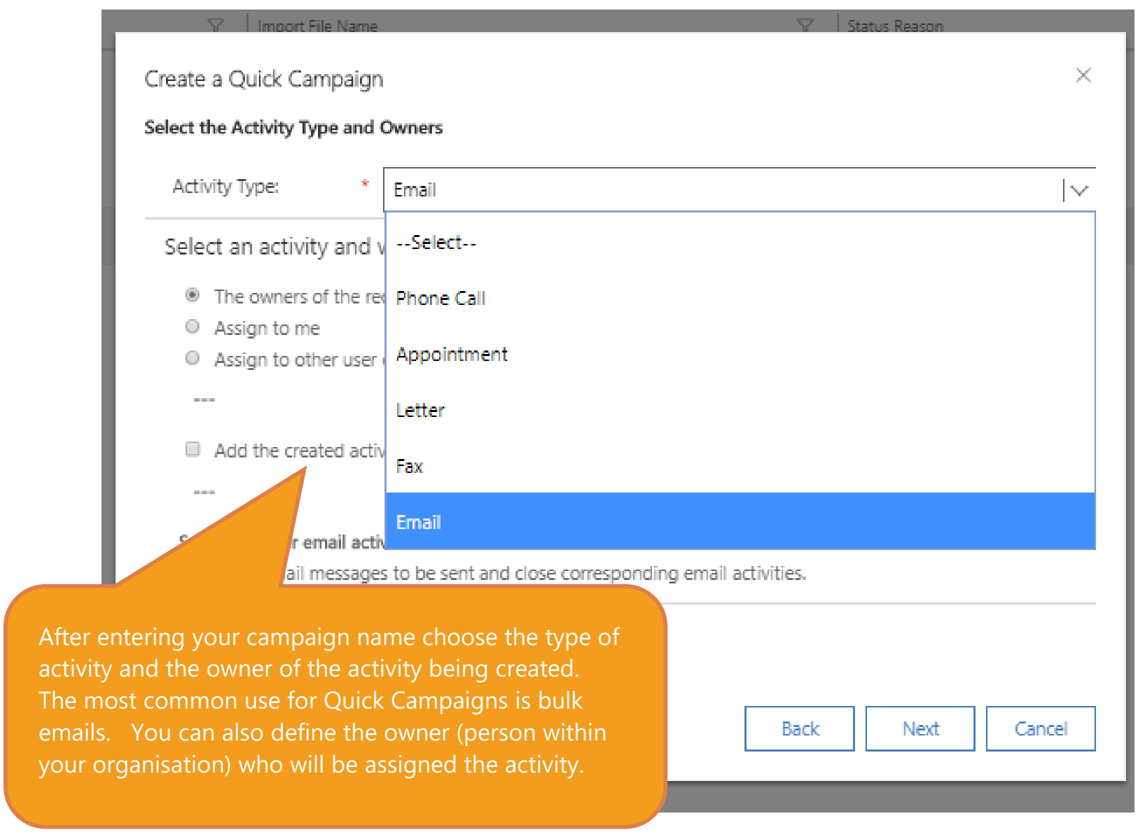
Quick campaigns allow you to efficiently organise a bulk communication to a marketing list. They however do not have the same degree of functionality of standard campaigns which includes tracking, the use of multiple marketing lists and budget monitoring. How to create a Quick Campaign from your marketing list.

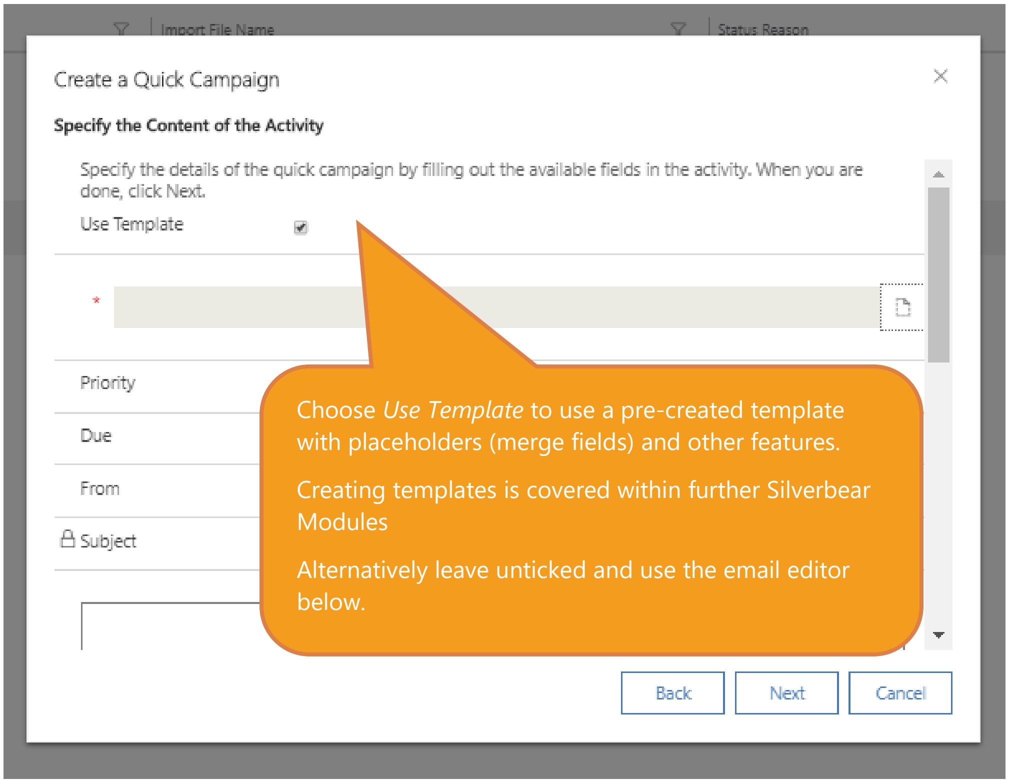
- Open your marketing list, and Click on + *New Quick Campaign* on the Summary tab in the Quick Campaigns section

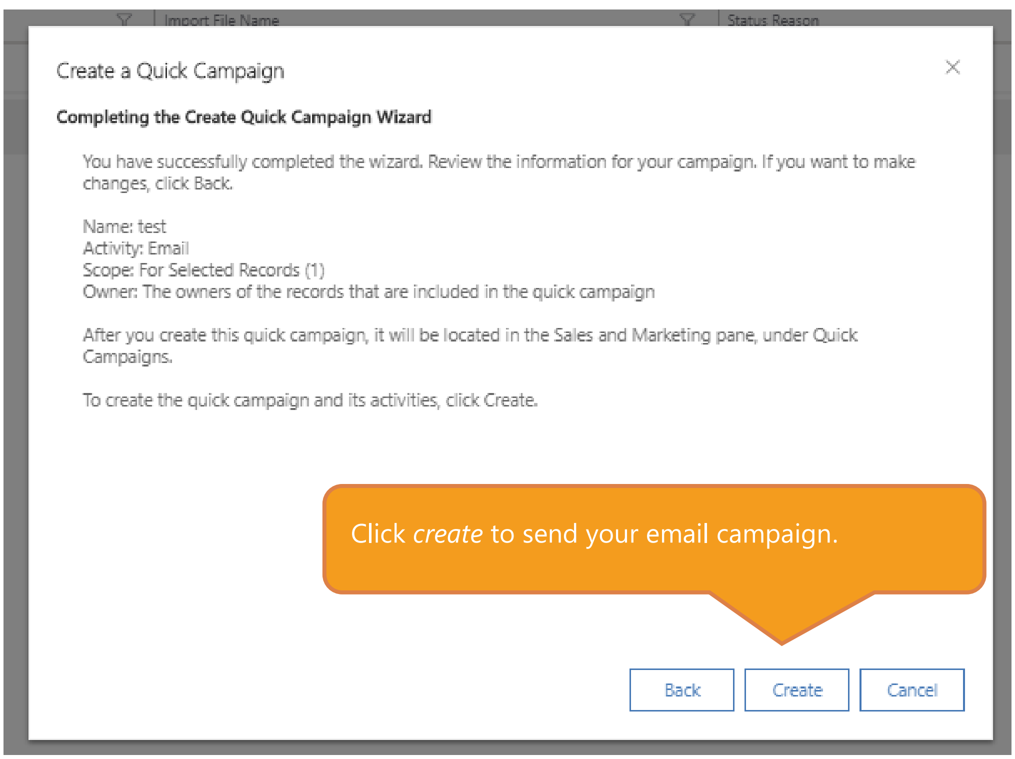


- A Quick Campaign Wizard will appear






Import File Name
Status Reason
Create a Quick Campaign
Specify the Content of the Activity
Specify the details of the quick campaign by filling out the available fields in the activity. When you are done, click Next.
Use Template
Priority
Due
From
Subject
Choose Use Template to use a pre-created template with placeholders (merge fields) and other features.
Creating templates is covered within further Silverbear Modules
Alternatively leave unticked and use the email editor below.
Back
Next
Cancel


Import File Name
Status Reason
Create a Quick Campaign
Completing the Create Quick Campaign Wizard
You have successfully completed the wizard. Review the information for your campaign. If you want to make changes, click Back.
Name: test
Activity: Email
Scope: For Selected Records (1)
Owner: The owners of the records that are included in the quick campaign
After you create this quick campaign, it will be located in the Sales and Marketing pane, under Quick Campaigns.
To create the quick campaign and its activities, click Create.
Click create to send your email campaign.
Back
Create
Cancel

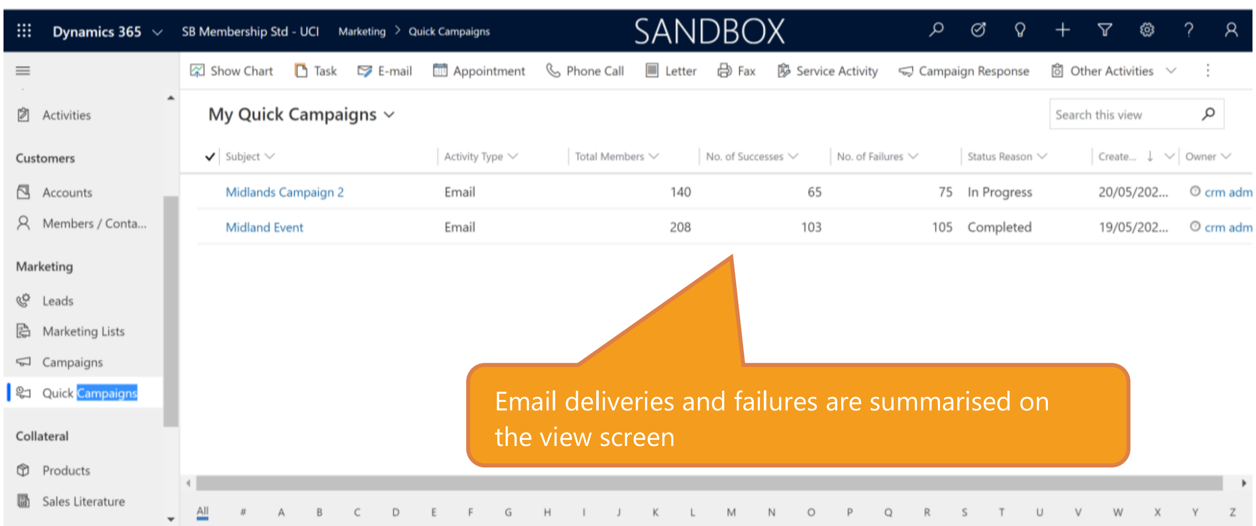
12. Quick Campaigns – other communication methods.

Other uses for the Quick Campaigns could be:

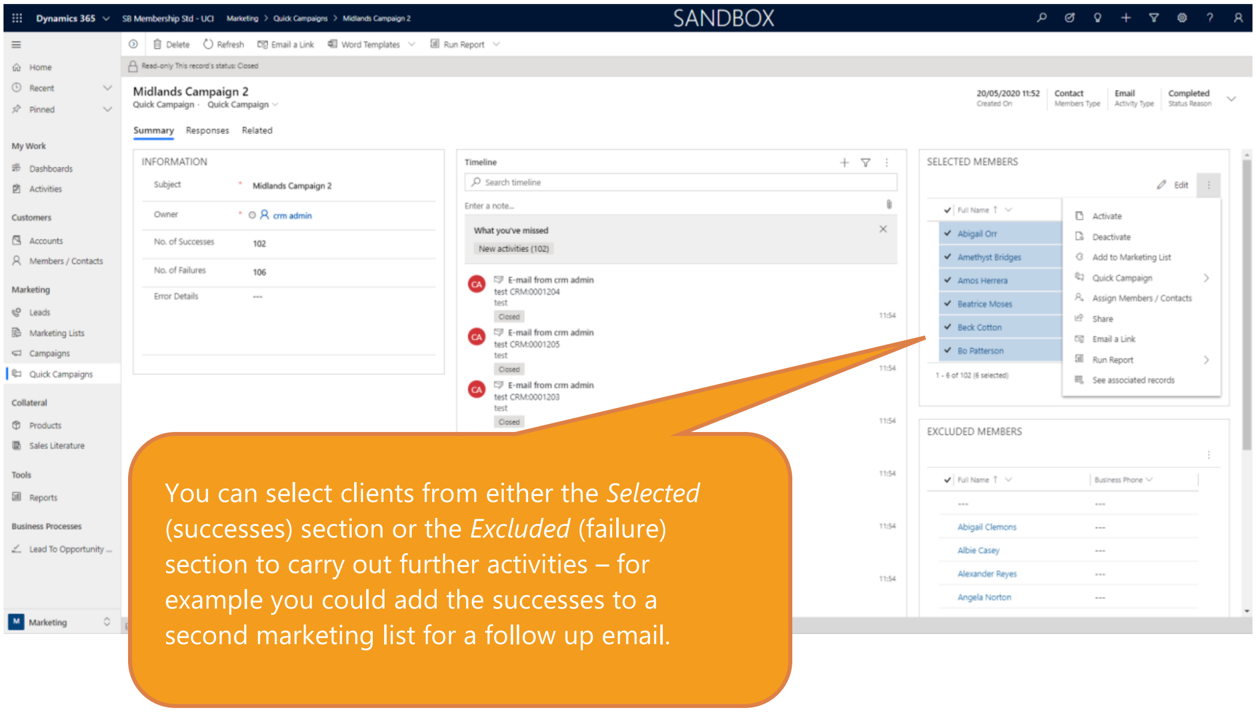
- Phone Call – if you have used a telemarketing process to contact your Marketing List you can record the details of this phone call through Quick Campaigns. Alternatively, you could select *Add the created activities to a queue* option in the Quick Campaign Wizard to assign the calls to a team or team member to make.
- Letter – record that you have sent out / are due to send out a campaign letter to this list
- Appointment – create an appointment – note however that all the members of the list would have the same appointment time and other details.

13. Monitoring Quick Campaigns

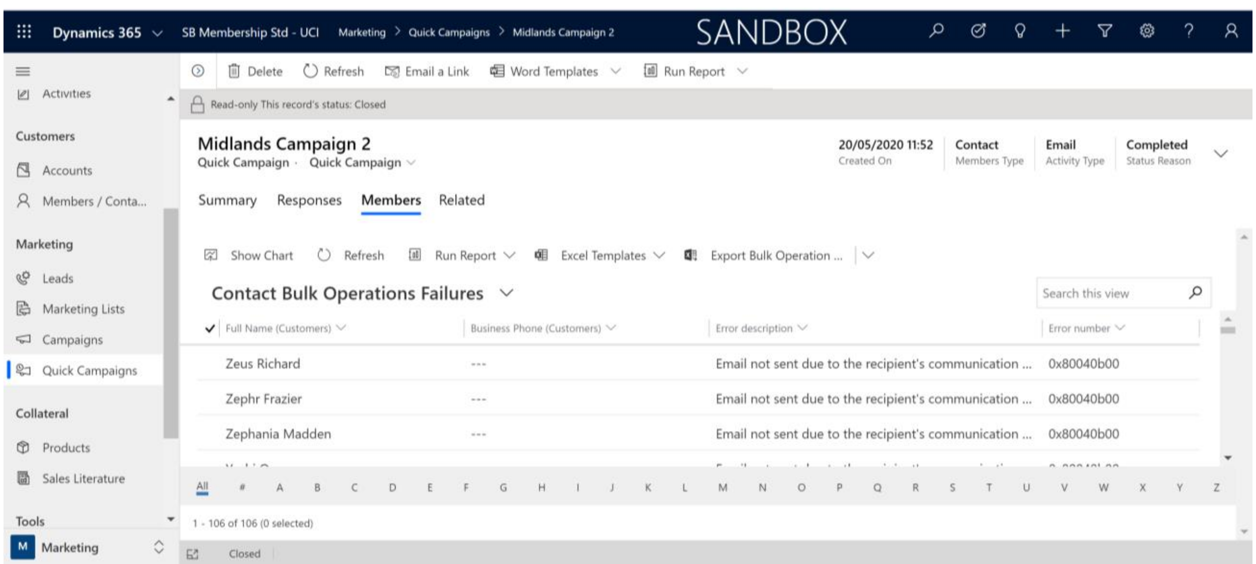
- To view your Quick Campaign, you can access it via the *Marketing* work area and the *Quick Campaigns* menu option. Alternatively, you can click through into the details via your marketing list Quick Campaigns section,



- Click through the campaign to the details including (if it is an email campaign), the emails issued and the see the lists of email successes and failures. The lists are given as a view and there is functionality which can be applied to those lists.

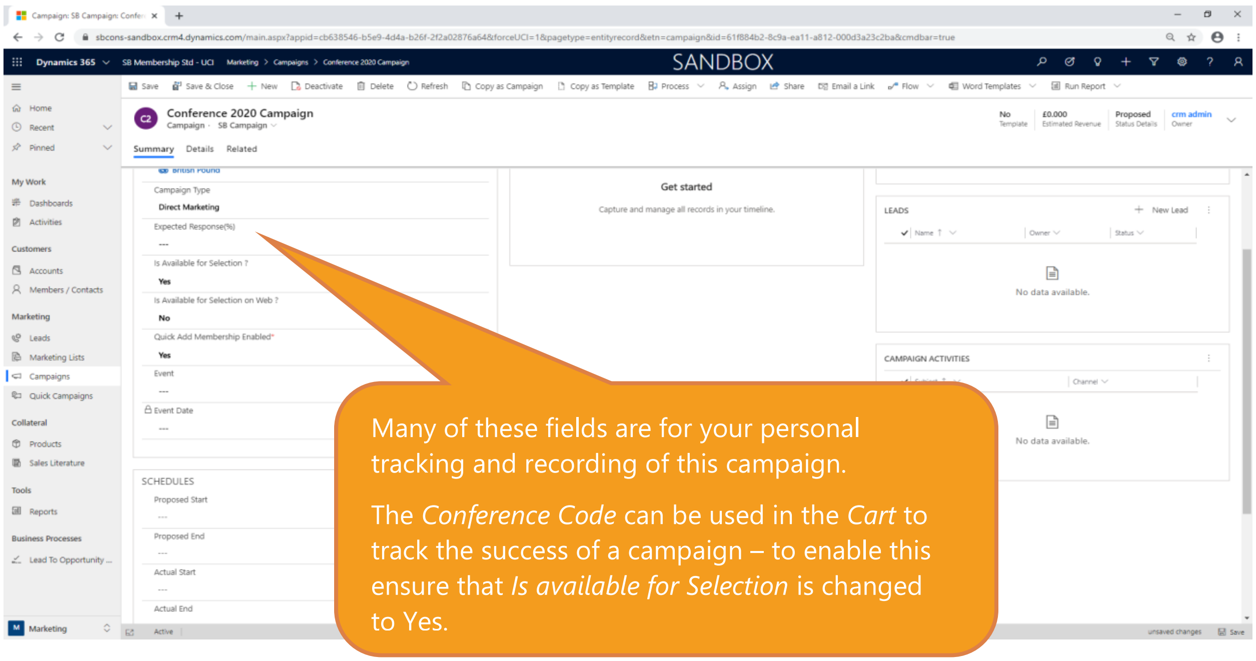


- You can also view further information on why the failed emails did not reach the recipients by clicking on the *Members* tab and selecting the relevant view (in this case the view is *Contact Bulk Operations Failures.*



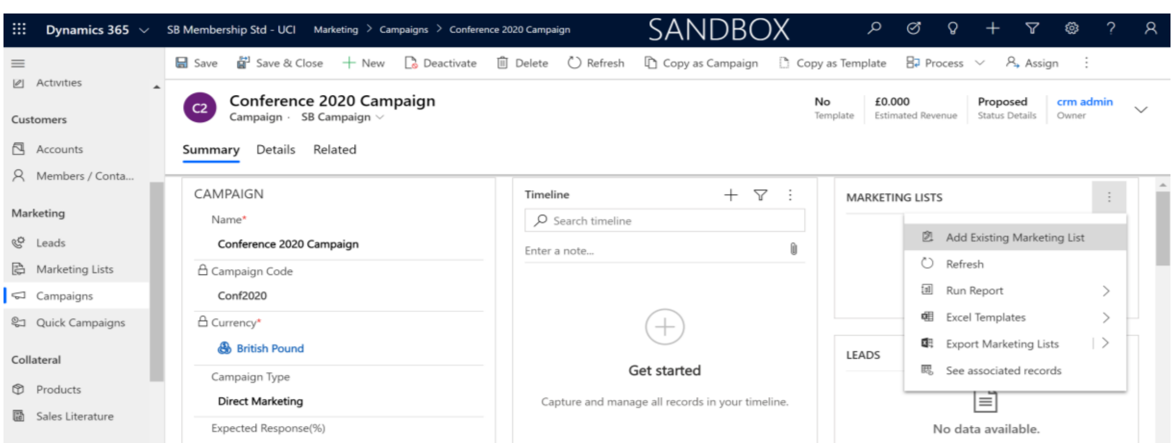
14. Creating a Standard Campaign

- Standard Campaigns can also be created from Marketing Lists. Or alternatively, as below, choose the *Marketing* work area, and then *Campaigns*, and press +*New*.
- Complete the mandatory details (e.g. name and code) and any chosen optional information and press *Save*.

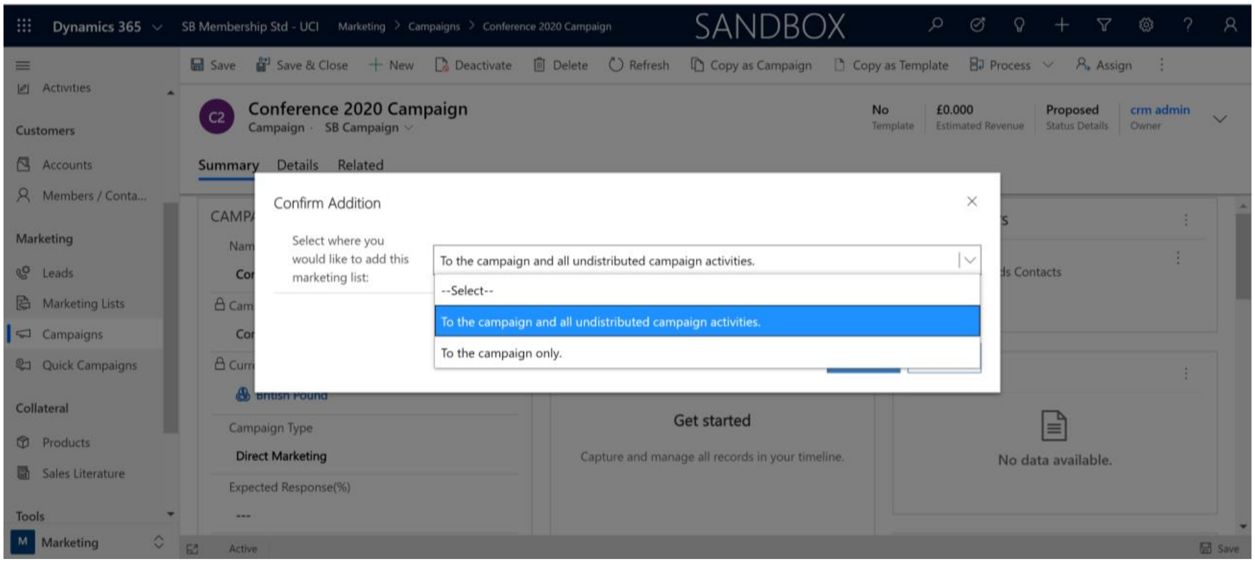


15. Standard Campaign Targeting Options

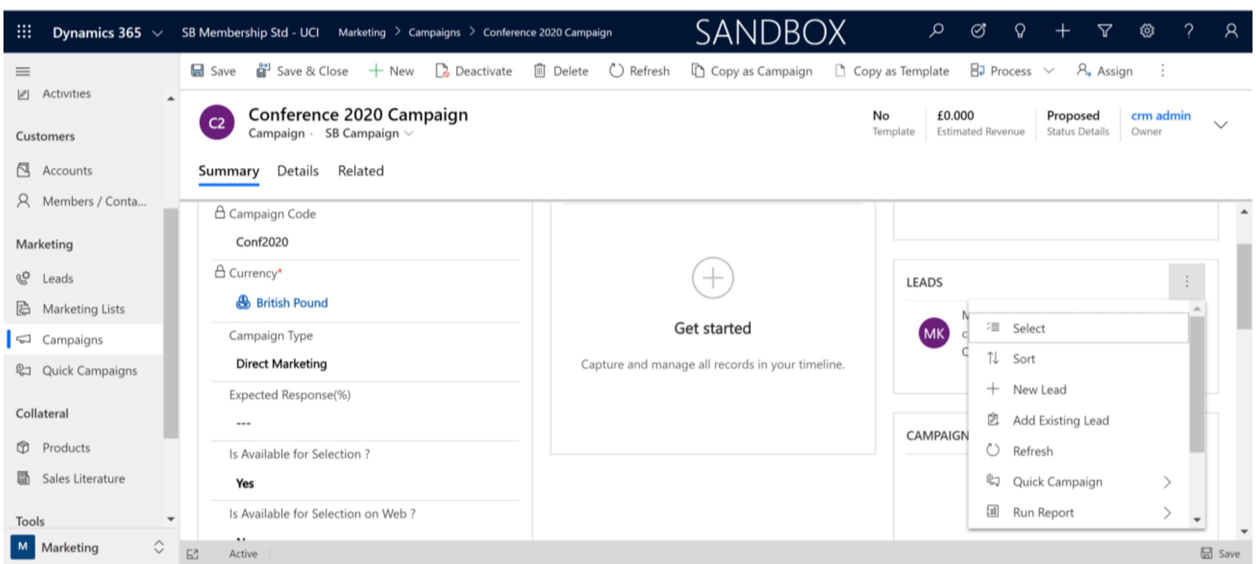
- A standard Campaign is a little more sophisticated than a Quick Campaign. One new element is the ability to target it at more than one marketing list, and the ability to include leads who are not on marketing lists.
- To add marketing lists to your Campaign, click on the ellipses (...) symbol on the top of the Marketing List section on the *Summary* page of your Campaign.



- You can then choose how you would like to use this Marketing List. If you select *To the campaign and all undistributed campaign activities* then emails, calls etc that you create will automatically use this list. If you choose *To the campaign only* you will need to define which lists are used for which activity later in the process. This is the recommended option if you are creating a highly segmented campaign with different communications to different groups.



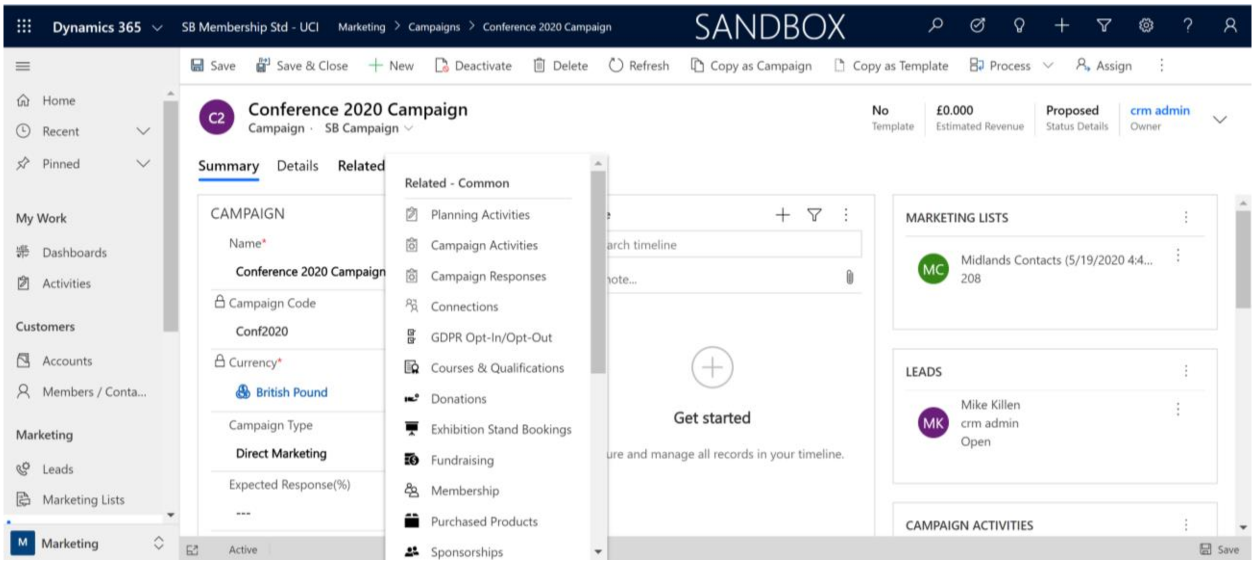
- Existing and new leads can be added through clicking the ellipses on the top right of the Leads section. Leads records normally consist of details of initial enquiries from potential purchasers or connections. Information on the use of leads is covered in the Sales module of this course.



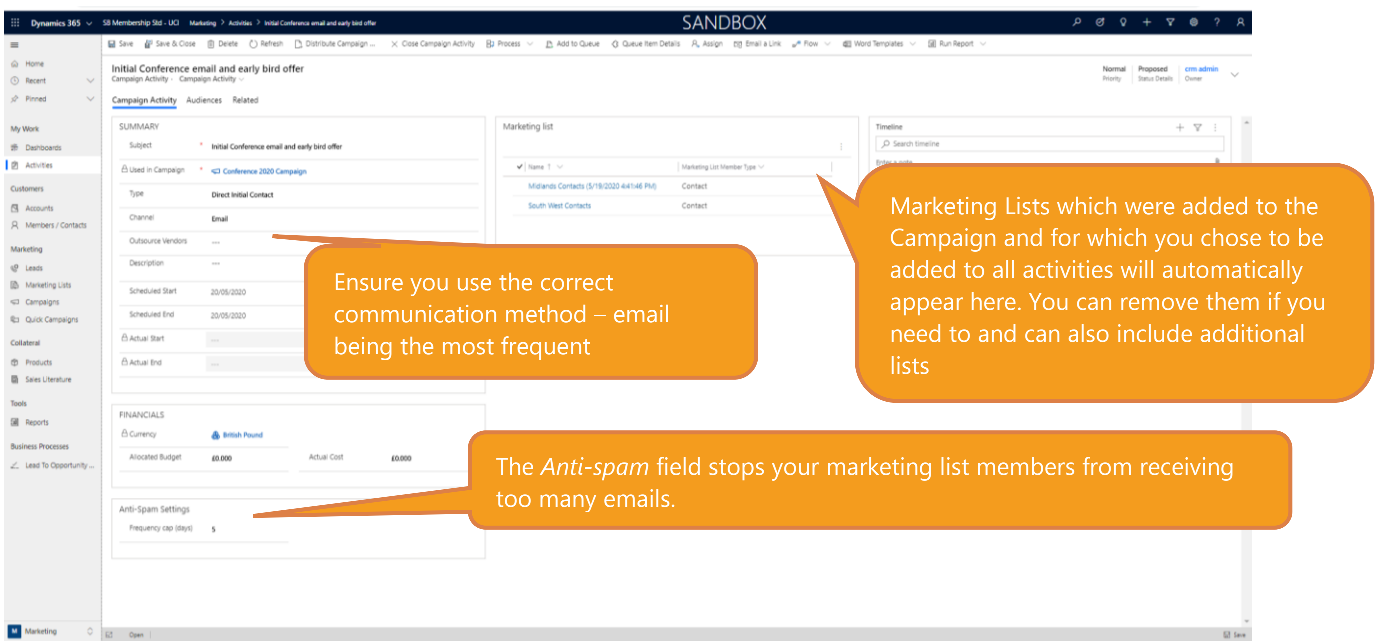
16. Adding activities to your Campaign

This section will cover the creation of activities which will make up the communications element of your campaign. At this stage you can set up the activities, but you do not have to issue those communications immediately.

- To add a new activity, click *Related* and then choose *Campaign Responses*



- On the following screen choose *+New Campaign activity* to see the form below



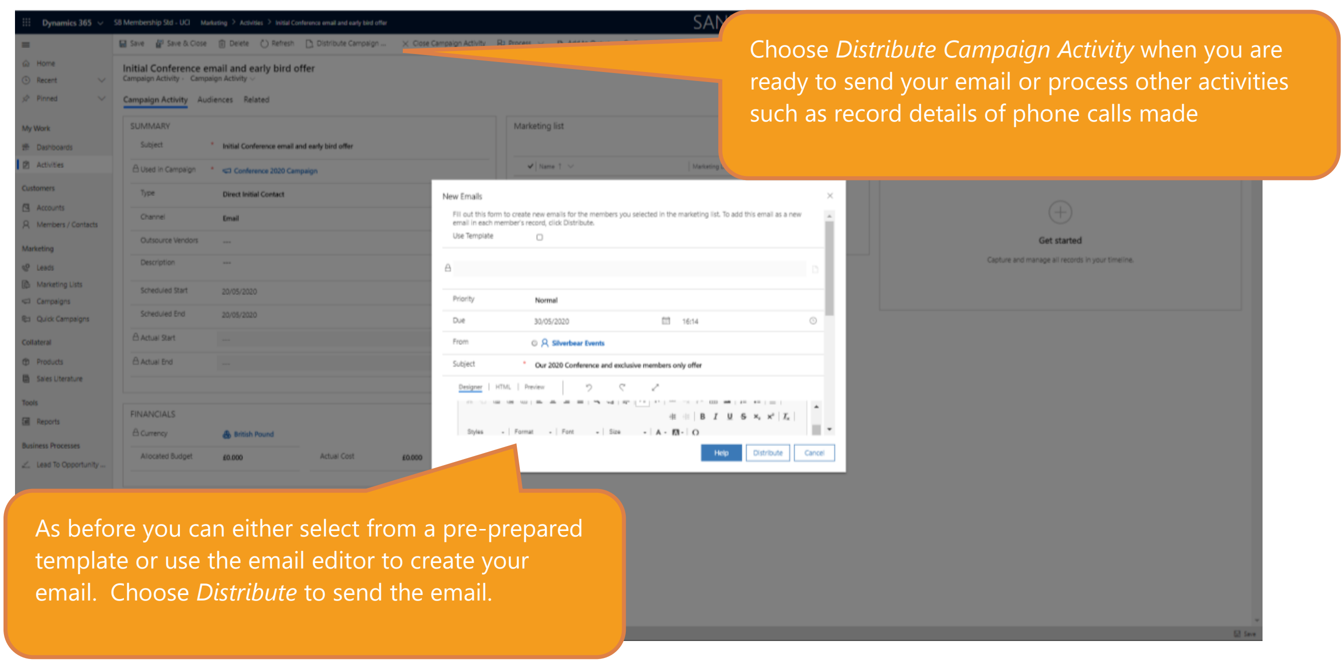
Add any additional marketing lists that you would like to include in this campaign activity. Note these lists must already be included on your campaign, so if necessary, go back a step and add them to your campaign.

In the Anti-Spam Settings section, enter the frequency limit in days for marketing activities directed at any contact in this campaign. The system will look at the last contacted date on the relevant record card and will not send a member of a marketing list your email if they have been too recently contacted. This activity has been set at 5 days, therefore if any marketing list members had been contacted less than 5 days before this email is issued, they will not be sent it. Entering "0" results in no restrictions.

- Include any costs associated with this activity for overall budget tracking for this campaign. Costs are accumulated and shown on the Details tab on the Campaign record

17. Distributing campaign activities

- The previous step established the details of the activity. You can add further activities (for example, a follow up call) before issuing any communications, or you can distribute them as you create them.
- To carry out an activity – e.g. send an email or record details of a telemarketing call, press the *Distribute Campaign Activity* on the Command Bar.

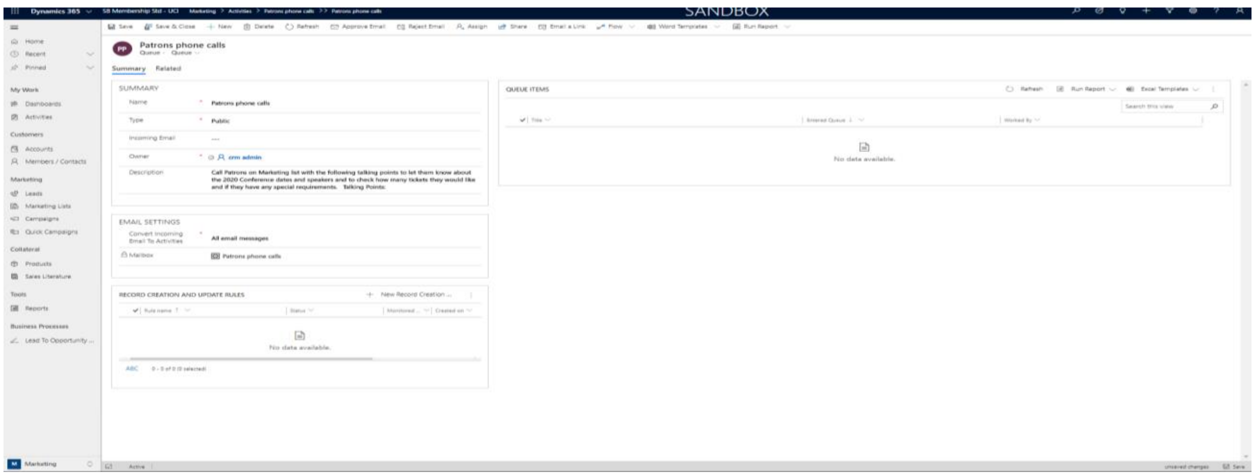


- Create your email by using the editor or choosing from a template. This process is the same as with a Quick Campaign
- After issuing an email you can see successes and failures (just as with a Quick Campaign). These appear on the *Audiences* tab for the Campaign Activity.

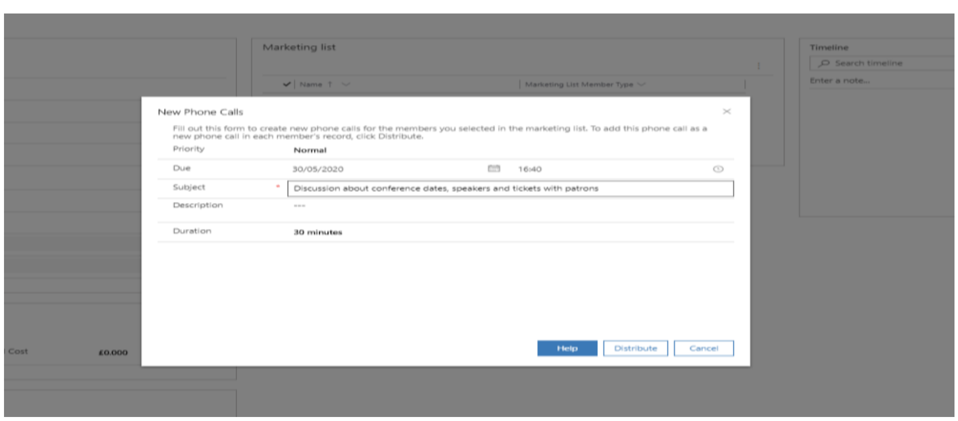
18. Using the Queue (for calls and other interactions)

For certain clients you may prefer a more individual approach such as a letter or phone call. Your Silverbear CRM allows you to create other activities such as calls, and these can be added to a Queue which is then handled by a member of your organisation to process. A Queue is a list of activities to be carried out. For example, they could have a set of calls to make, or a list of clients to send a more personal and individual message to.

- Save your activity and then press *Add to Queue*
- You may need to create a new Queue; an example is given below:

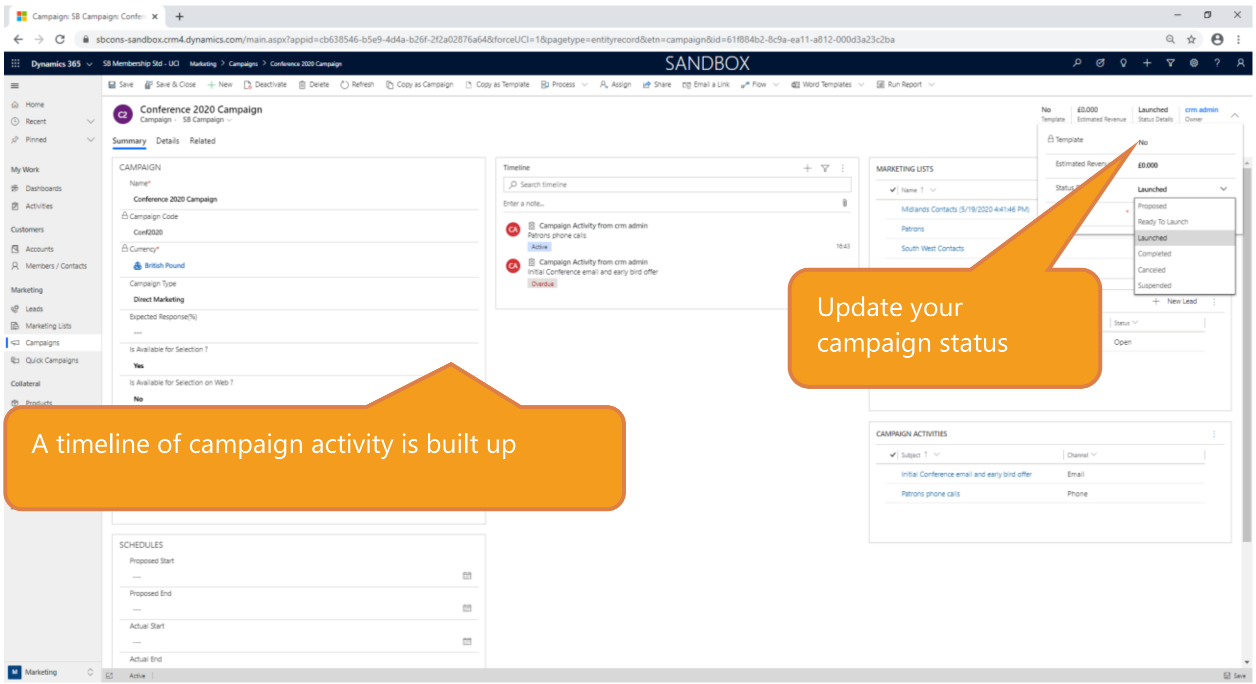


- After creating and saving and closing the Queue you will then need to choose Add to Queue again. Select the queue you have created
- The activity will then appear in the selected team member's *My Activities* section, which appears on the left-hand menu.
- Once the activity has taken place, choosing *Distribute Campaign Activity* will add details of the phone call to the record cards for the marketing list members.

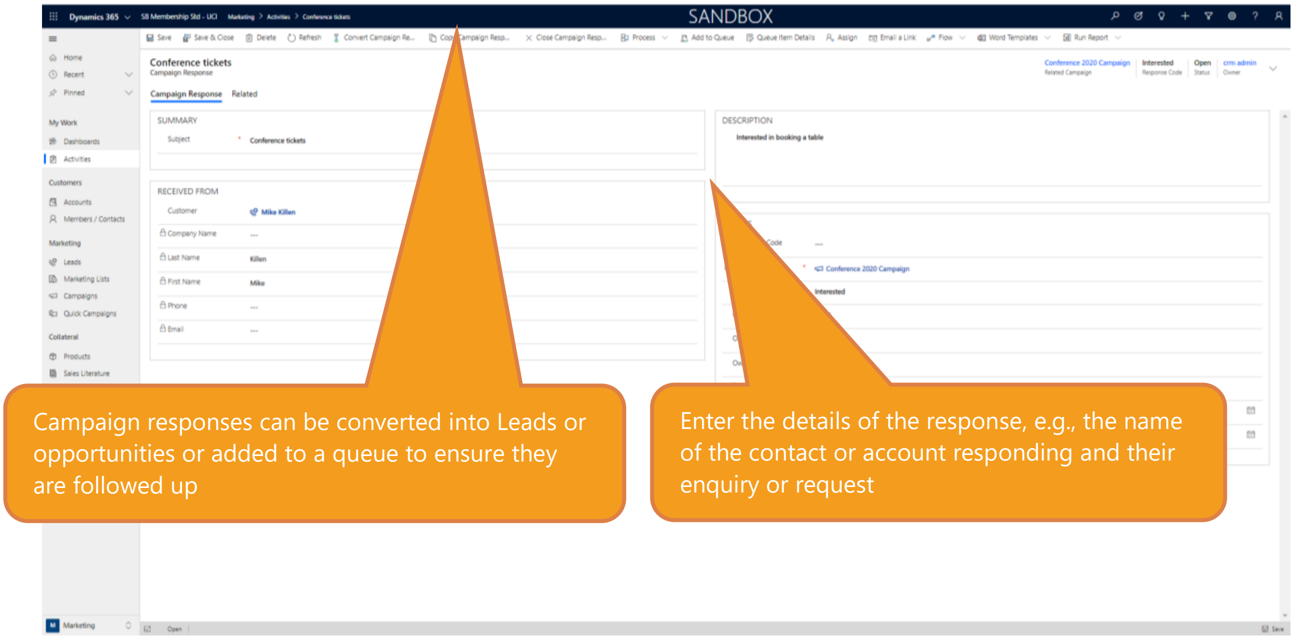


19. Monitoring and progressing a campaign

- You can change the Campaign *Status* to track the progress of your Campaigns
- A timeline of activities is created as activities are distributed



- The *Details* tab for Campaigns holds information about the budget and costs. If you have attached an actual cost for an activity, then this will be included in the *Activity Cost* and the *Total Cost* fields on this screen
- Responses can be added manually on the *Details* screen. For example, if you had a member of the Mailing List call or email in to request more information or show interest in membership or an event you could add those details as a response record.

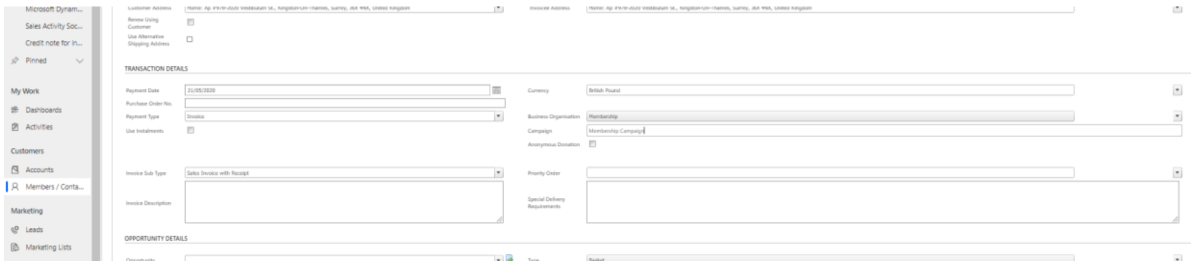


(For automatic response handling and click through/opens data an imbedded email solution is required - please speak to your consultant or account manager if you would like more details on options)

20. Campaign tracking through the Cart

Campaign codes can be attached to sales in the CART, allowing you to record where your campaign has resulted in a purchase and track the success of your promotion.

- On your Campaign setup the *Is Available for Selection* field must be set to Yes.
- In the Cart select the code for the relevant campaign and then process the sale as normal



- You can then run an Advanced Find on any memberships with this campaign code attached, and perhaps save it as a View for ongoing tracking.