Service Autopilot™

SALES CAMPAIGNS

User Guide

Version 1.0

Table of Contents

Summary

Advanced users of Service Autopilot™ can use Sales Campaigns to upsell to Clients, to recommend new Services, and also to fill in the gaps with Clients who may not be utilizing the full range of a specific type of Recurring Service or Package.

If you develop a new Service that complements a current one, a Sales Campaign can pull all of your Clients with the current Service, offer them the new one, and give them pre-pay and other discounts. You may find that you have Clients who consistently take advantage of, say, a Fall Clean-Up or a Spring House Cleaning, or maybe a Winterization service. They don't, however, have the Spring Clean-Up, other periodic House Brightening Services, or a Pre-Summer check-up. Maybe you have Packages for whom some Clients only do three out of five rounds. Use Sales Campaigns to send out letters with Recommended Services included in a layout that allows Clients to see what they currently pay, what they could be getting, and any discounted prices as well.

Sales Campaigns can be done seasonally, at the end of the year when your Packages renew, or any other time you choose. Since Sales Campaigns are made of physical letters, you can use them to market recommended Services even to Leads without sending individual emails, in order to avoid anti-spam legislation constraints.

Getting Started

Enabling Sales Campaigns

Sales Campaigns is an advanced Service Autopilot™ feature that requires the Pro subscription. You will also need to have one of our Support Specialists turn on the functionality for you.

Permissions

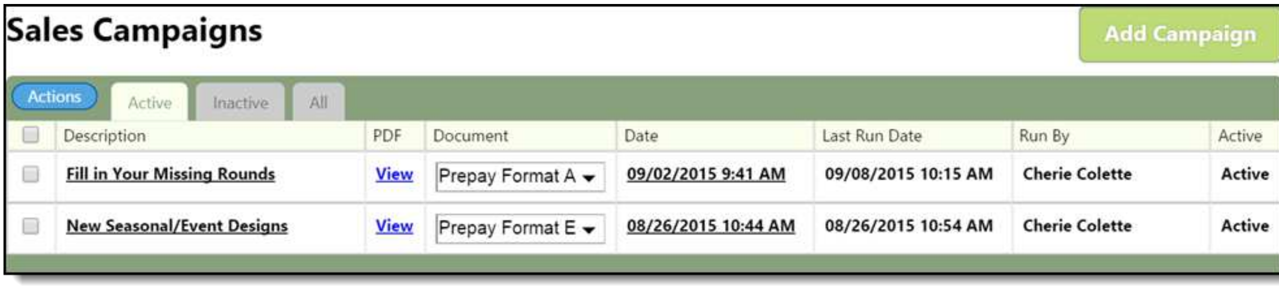
There are no permissions associated specifically with Sales Campaigns.

Where to See Sales Campaigns

To view Sales Campaigns or begin a new one, go to **CRM>Sales Campaigns** under the Marketing tab. This will open the main screen for Sales Campaigns.

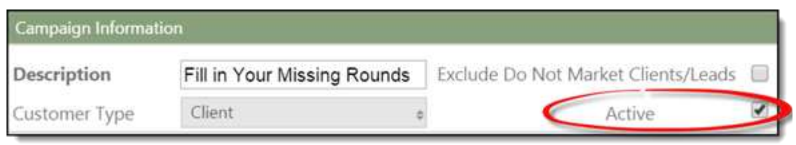
Sales Campaigns Home Screen

The home screen for Sales Campaigns contains a list of campaigns by creation date order, newest first. You can view and then print the PDFs, change the Format of the letter, and edit the campaigns from the links under Date and Description.



Actions

From the “Actions” button, delete campaigns or add new campaigns. You can also add a Campaign from the “Add Campaign” button at the top right of the screen. In order to deactivate a Sales Campaign, you need to open it and uncheck the “Active” box under “Campaign Information.” This will remove the Sales Campaign to the “Inactive” tab.



Document

Change the Prepay Format from this drop-down and then review the PDF by clicking the **View** link.

PDF

This is how you print letters in a campaign. Remember that longer PDF files can take a while to load. Every Sales Campaign opens a PDF with individual letters comprising one page each. If you sent out 100 letters, the PDF file you are viewing/loading will be 100 pages long.

Copy

Create copies of campaigns in order to alter or personalize material for different neighborhoods, zip codes, or kinds of Clients. Clicking “Copy” will create a new campaign at the top of your list.

Building a Campaign

Clicking the “Add Campaign” button or adding a new campaign from the **Actions** button opens an overlay with the various potential steps of building a Campaign listed across the top as tabs. In your initial build, you must progress using the “Next” button at the bottom of the screen, but once you have been to each tab you can simply click the tab to jump from Document to Scheduled Jobs, etc. as well as use the “Next” and “Previous” buttons.

1: Filters

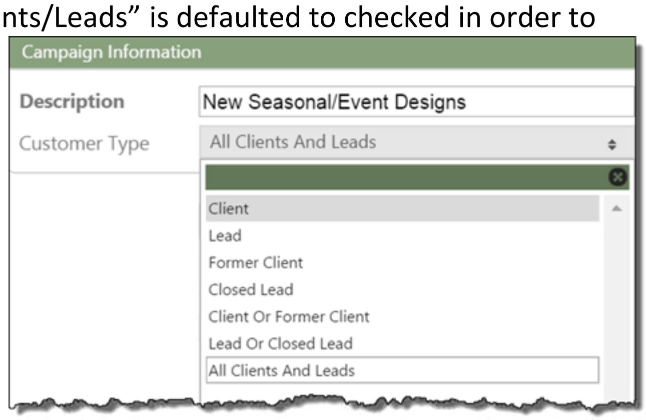
The first step in creating a Sales Campaign is to generate a list of Clients and/or Leads to whom to send letters.

Campaign Information

The top section of the Filters screen contains basic **Campaign Information**.

As mentioned above, this area also includes a checkbox for you to activate or make the campaign inactive. The default is “Active.”

The checkbox for “Exclude Do Not Market Clients/Leads” is defaulted to checked in order to make sure you do not send the letter to those people who have opted out of your marketing.



Choose a description for the campaign and decide what kind of Customer will be included in the list for filtering. This allows you to pre-filter your lists and can help you distinguish identical campaigns that you have run for Clients versus Former Clients, etc.

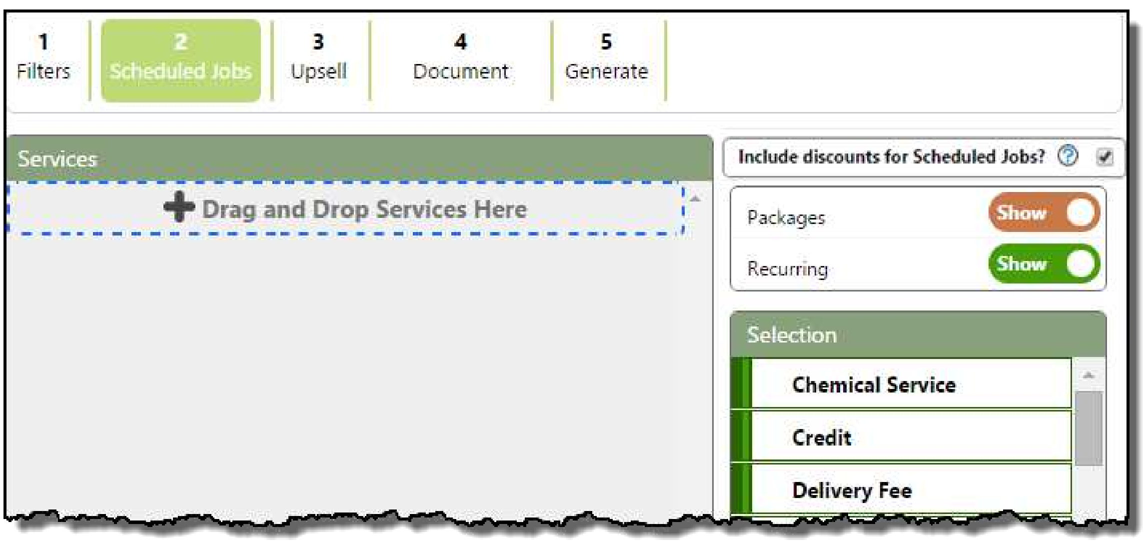
Filters

You can create multiple filters for a campaign, but remember that they piggyback. Each filter will narrow your search further. As with Marketing Emails, you can still delete people manually from a final, filtered list by clicking the red “X” on the right of their entry. This creates a strike-through for that line and changes the icon to a green “**+**” to allow you to add the person back if you have made the omission in error.

When you have completed filter selections, click **Next** -- or the “2” tab at the top of the screen if you are editing an already-created campaign -- to move to the next step: **Scheduled Jobs**.

2: Scheduled Jobs

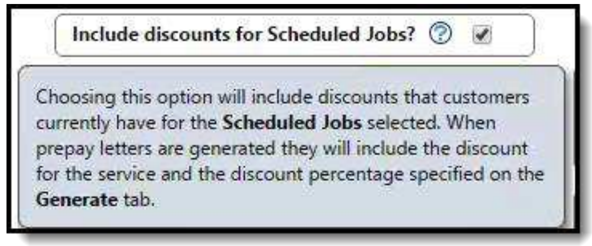
The second tab looks for and prioritizes Services you want the letter to display. Drag and drop from the right to the left, and change the priority by dragging Services up and down in the left panel.



When generating letters, the software will look for those Services for which the filtered Clients have Scheduled Jobs. For ease of viewing and selecting, you can show or hide Services or Packages in the right panel.

Include Discounts for Scheduled Jobs

At the top right, this checkbox allows you to include or exclude additional discounts that may be active on Services, separate from any prepay discounts you may offer. Clicking the help icon will open a dialog explaining this.

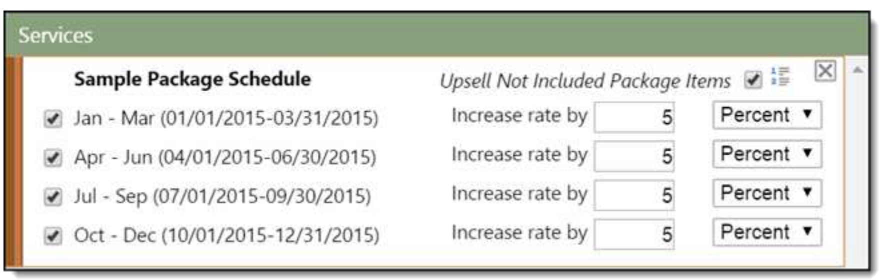


Recurring Jobs

Recurring Jobs display in green. When you move them left, you will have the option of increasing the rate by a value/dollar amount or a percentage.

Packages

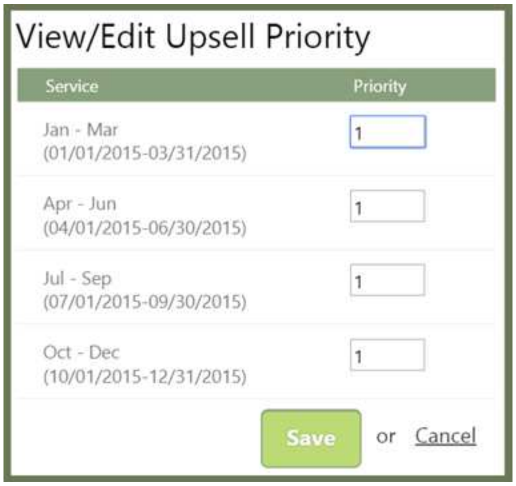
Packages display in brown. In the left panel, their rates can be increased by value or percentage just as Recurring Jobs can. With Packages, though, there are a few extra options.



You may choose, with Packages, to upsell Rounds that Clients have not included in their chosen Packages in the past. By selecting all, which will automatically be done if you click the “Upsell Not Included Package Items” box, the software will include an Upsell in the letter for anyone who was missing any of those Rounds. You may also select only specific Rounds to upsell by unchecking the boxes on the left individually.

Having chosen to upsell Package items or Rounds, you can click on the small image next to the checkbox.

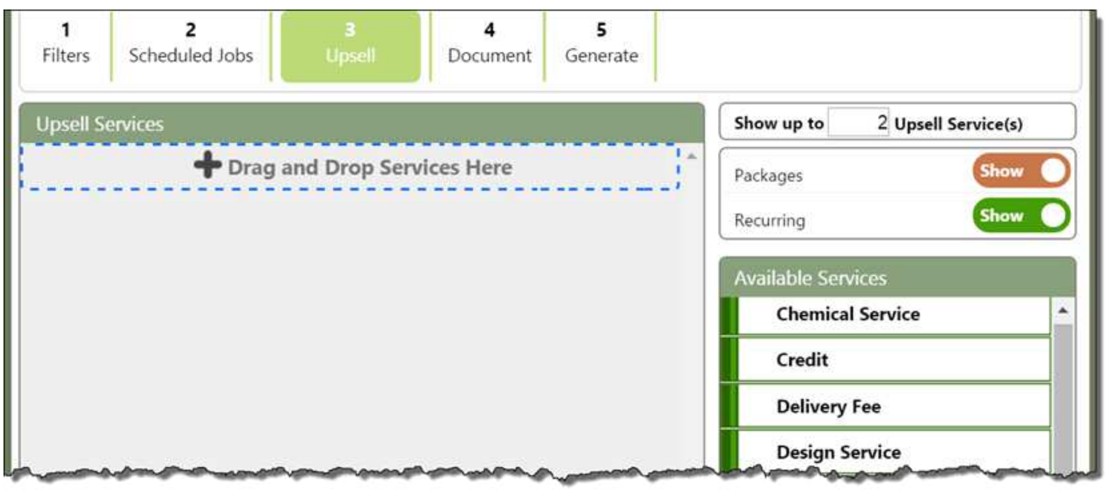
This opens a “View/Edit Upsell Priority” popup allowing you to prioritize the upsell for the Package Rounds in ascending order (1, 2, 3…).



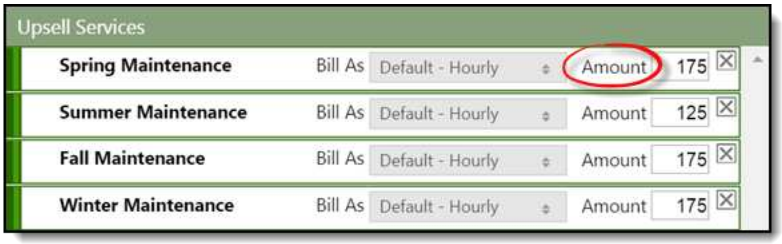
You may, for instance, want to upsell Rounds based on how much money they make you. You may have an excess of product that is used only on certain Rounds and which you need to try to use. On the other hand, you may be considering that one of your Rounds has very little added value and might be rolled into another, in which case you might set that priority lower. The priority set at this step will take precedence over the priorities set in the next tab’s **Upsell** options.

3: Upsell

The Upsell tab allows you to specify which Services you want to upsell and also how you would like to determine the rates for those.

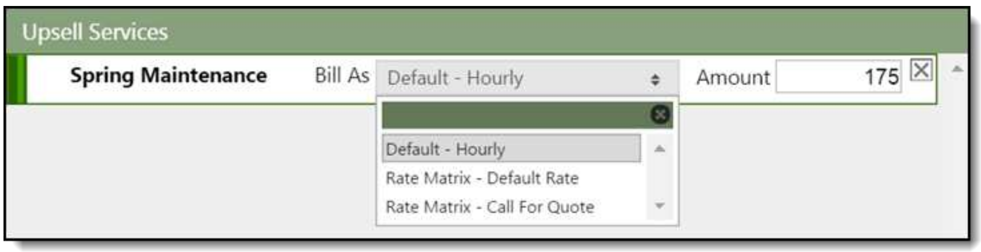


Drag and drop from right to left to add Services and prioritize them by dragging and dropping up and down as you did in the **Scheduled Jobs** tab. These are Services that you specifically want to upsell.



The Amount field at the right of the Service line item allows you to enter a new price to override the original rate for the Service. Also, a “Bill As” dropdown gives you some options when generating letters.

Bill As



- **Default**: This option will base the rate on the Service’s Default Rate, whether Hourly, Flat Rate, or Per Unit.
- **Rate Matrix – Default Rate**: Rate Matrices are based on Custom Fields, frequently square footage. If there is a value entered into a Client’s specific Custom Field used in the Rate Matrix, that value will be pulled to calculate the Rate for the Upsell Service. If there is no information in the field, the letter will quote the Default Rate.
- **Rate Matrix – Call for Quote**: With this option, if a Custom Field used in a Rate Matrix is blank, a message will appear for that Client requesting her to call for a Quote. This keeps you from over- or under-bidding the cost of a Job if the rates are based on square footage or number of rooms that could considerably alter the cost. You wouldn’t want to base a rate on a Default Rate if the property were four times as large as that of your standard Client’s, upon which you based the Default Rate.

Prioritizing Upsell Services

Choose how many Services you will upsell in any given campaign by entering a number in the “Show up to…” box on the top right of this screen.

NOTE: If you have chosen to upsell in the previous tab, those decisions will take precedence over what you set in this tab.

For example, if you choose to upsell no more than 2 services and have also chosen to upsell package rounds in the previous screen, Clients who are upsold two package rounds to fill in gaps will not be presented with the upsells on this screen, as they have already met or exceeded the upsell criteria from the Packages.

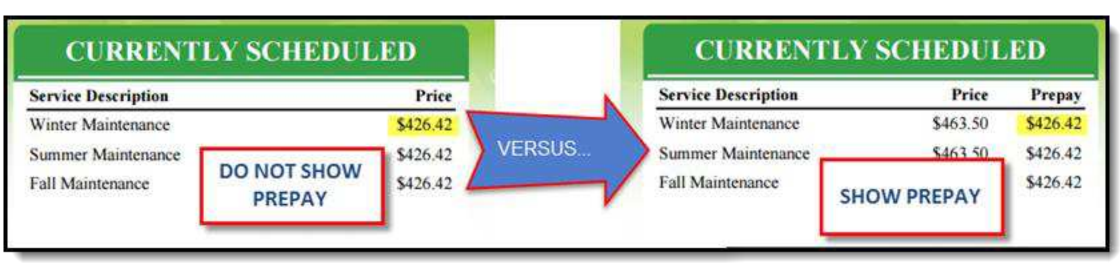
4: Document

When you know what you're selling, how you're selling it, and to whom, you are ready to create the document that wraps all of the information.

Document Settings

The top portion contains the general information for the campaign letter. As you preview the Document Formats, you will see that they are static examples of how the letter will look. There are both color and greyscale formats. Letters are made to work with a standard tri-fold #9 envelope with an address window.

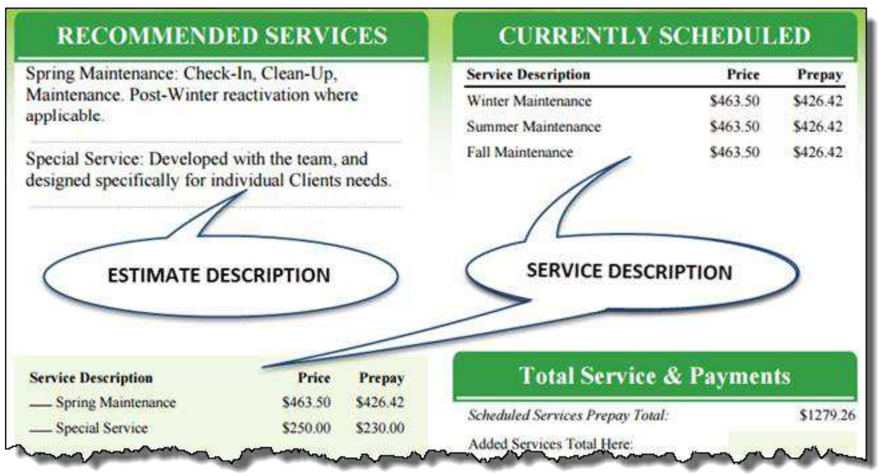
- **Print Prepay Discount:** If you check this box, all Currently Scheduled rates will print with the original price in one column and display the prepay, discounted price in a second, "Prepay" column. If you do not check this box, both Recommended Services and Currently Scheduled will show only the "Price" column with the prepay discount (see Discounts) applied to them instead of two columns that show both.



Text on Services

The letters you build will pull text from two places: Service Descriptions and Estimate Descriptions. Any Recommended Services will pull the text from those Services' Estimate Descriptions, while the Currently Scheduled and pay totals for Recommended Services will use the Service Description.

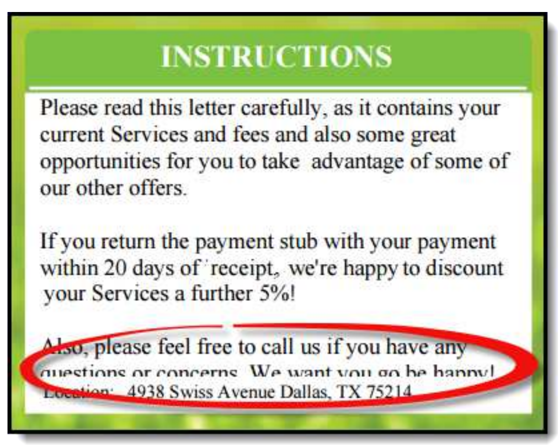
Make sure that the text you've entered in the Estimate Description on your Services is easy to associate with the Service Description under it, so that Clients understand which Service associates with each description. We use Estimate Descriptions for Recommended Services so that you can include more information describing the Service for someone who may be unfamiliar with it.



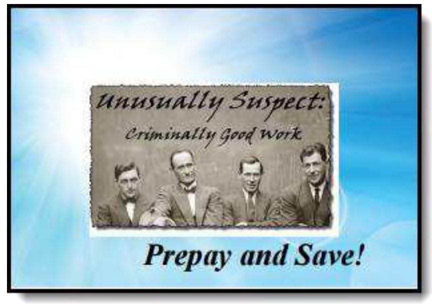
Messages

There are three places into which you can enter information under the Message portion of the Document screen.

- **Instructions**: Any instructions you choose to include will appear in the top right portion of the letter. Given the level of customization available for your instructions, we cannot make the software automatically tell you when your text has exceeded the space available. It is important, therefore, that you preview the letters to make sure the instructions fit into the area. Text and images that do not fit will be cut off in the letter. For example, I've lost the last line of my instructions at right.



- **Header**: The top left of the letter contains the Header. Most formats display the Estimate Logo in the Header. If you have no logo, you can enter text here. There is room for a few lines of text below most logos, but again, preview your letters to make sure things fit the way you want them to.



- **Footer:** At the bottom left of each letter, a shaded area contains the Footer. You can leave this blank or include a few lines of information: slogan, web site, quick tip, holiday greeting, etc.

TIP: You can only preview letters from the Sales Campaign Home Screen "View" link, and you must <u>generate the campaign each time you make changes</u> in order to see those changes in effect.

Until you are comfortable with the spacing and layout of the letters, if you have a large campaign to build, create it initially filtered down to one Client. This makes it much easier to generate the PDF with the letters. Once you have it looking exactly the way you want it to, go in and redo the filters to include the complete group of Clients to whom you wish to send letters.

5: Generate

In order to create letters for a campaign, you must **Generate** that campaign. You can do this from any of the tabs, but only the **Generate** tab contains the final information fields you might want to consider.

Discounts

In addition to changing prices manually or by percentage in the **Scheduled Jobs** and **Upsell** tabs, you can set an official Discount in this final tab. This will be applied to the letter in either a separate column – if you have checked the "Print Prepay Discount" box – or simply as the price of the Service.

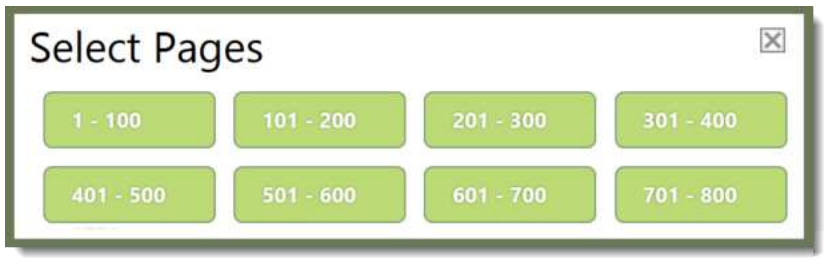
The Prepay column on the left side under the Recommended Services (your Upsells) reflects the percentage entered in the "Upsell Discount" field, while the Prepay column under Currently Scheduled Services reflects the "Scheduled Jobs Discount."

Add | Remove Tags

Throughout the year you may want to add Tags to Clients to remind you to include them in certain Sales Campaigns. When you generate a campaign, you can remove those Tags. Conversely, add a Tag to indicate (for example) that a Client has been sent a prepayment letter.

The Generate Button

The **Generate** button generates letters and is also the way to save changes to a campaign.



When you generate letters, you will need to be patient while they load, as they all load into a single PDF file. Short campaigns of 20 letters or fewer may only take a minute or two, but a large campaign will take several minutes to generate. Anything over 100 will display a popup asking you to view the letters in batches of no more than 100 at a time. You can leave the screen to complete other tasks while you're waiting. An alert will show when the letters have finished generating.

Notifications and Alerts

When letters have been generated, you will receive an alert viewable in the Quick Access icons.

The Alert drop-down will tell you that the letter has been generated, giving both the name of the Sales Campaign and the date on which it was generated.

An email notification is also sent to the email address of the Service Autopilot™ User running the campaign.

IMPORTANT REMINDER: You must regenerate your letters in order to save any changes you make to a Sales Campaign.