franconnect

Springboard to Success

Activities Book – Automating Data Refreshes

In the past two sessions, you've identified the information that you want to keep updated. In this session, we will discuss how to set up a cadence of reminders and a method for your franchisees to update their own information.

This book gives you the steps to:

- Make webforms that include the information to update
- Make campaigns that solicit updates
- Set workflows to trigger these campaigns automatically in the future

We invite you to use these instructions, to submit questions to training@franconnect.com, and if you're really really stuck, we invite you to schedule a 1:1 session with us to help you through these processes. You can schedule that time using this link: https://tinyurl.com/677y7tz8.

Contents

Make Web Forms that include the information to update

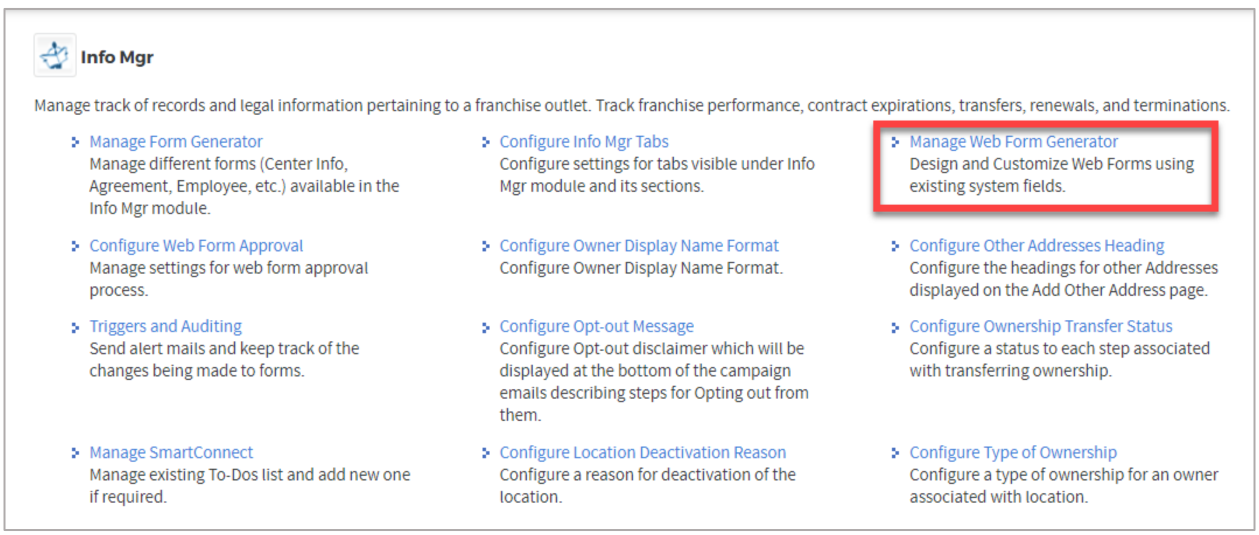
Sometimes, the easiest way to gather information from many or all franchisees is to have them submit the data. We recommend that to do this, you create a web form for them to complete, with the requested data. You'll map the data to existing fields in FranConnect, effectively giving your franchisees the ability to enter their own information directly to FranConnect. *Don't worry about them entering incorrect data – you'll have the opportunity to approve it before it goes into Information Manager, if you choose.*

Before you create a web form, you'll need to know where in FranConnect this information will be stored. Start in Form Manager (covered in "Keep it Fresh and Clean") to ensure that the data you're asking for has a destination inside Information Manager before you build your web forms.

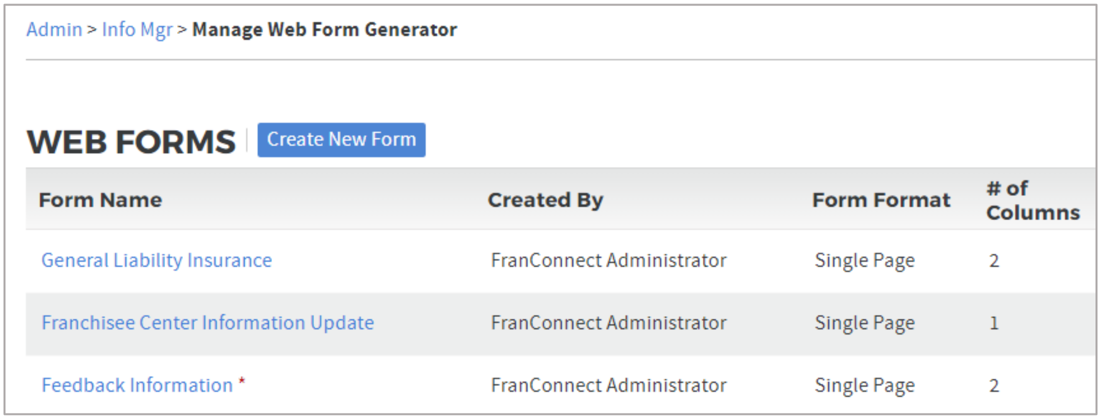
Creating Web forms

If you've used the standard web forms provided and find you need more for use on your website or via hyperlink to your leads, you can create web forms.

1. From Info Mgr in Admin, select **Manage Web Form Generator**.



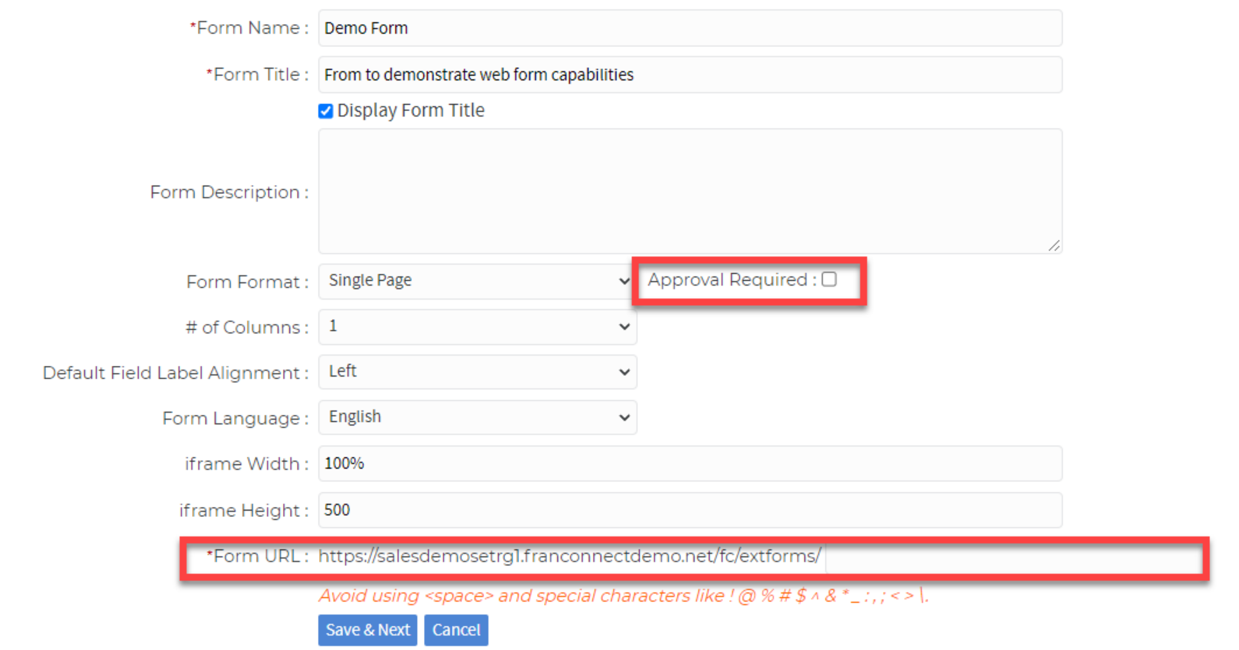
2. FranConnect has some web forms pre-built. If you'd like to start with one of these, choose the form from the action wheel to the right of the form name. If you're making a new form from scratch, click **Create New Form**.


Admin > Info Mgr > **Manage Web Form Generator**

WEB FORMS | Create New Form

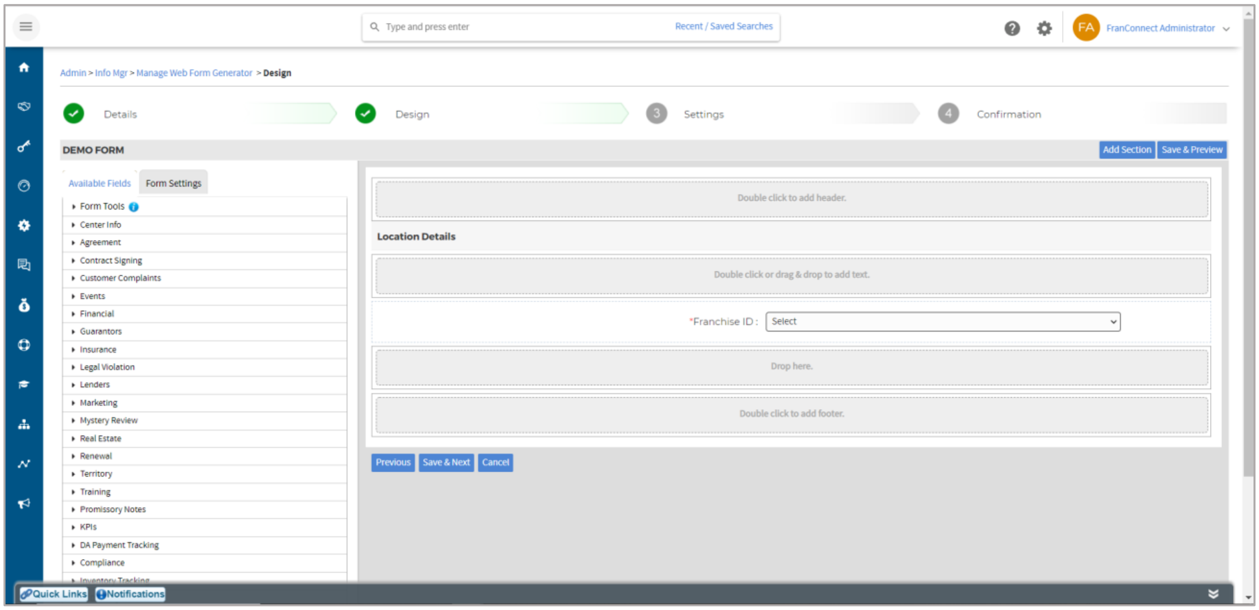
Form Name	Created By	Form Format	# of Columns
General Liability Insurance	FranConnect Administrator	Single Page	2
Franchisee Center Information Update	FranConnect Administrator	Single Page	1
Feedback Information *	FranConnect Administrator	Single Page	2

3. Input the **Basic Details**: note that when you click Save & Next the drop-down selections cannot be changed.
    - Form Name: The internal name used for this form.
    - Form Title: The name of the form the lead will see if the Display Form Title box is checked.
    - Form Description: Details about the form and its use.
    - Form Format: The number of pages you want the form to have. Pages appear as tabs at the top of the form. They are best used for multi-page application forms.
    - Approval required: This is where you set whether you want to review information inputted on the form before it goes into Info Manager. Check the box to have the information go into a queue for approval; leave it unchecked for the information to go directly into Info Manager.
    - # of columns: The number of columns you want the page to have. Most forms have 2 columns.
    - Default Field Label Alignment: Where you want the field name to be situated, either to the left of the field or on the top of the field. To the left of the field is most common.
    - Form Language: The language you want displayed on the form.
    - Iframe Width: The dimensions of the form.
    - Iframe Height: The dimensions of the form.
    - Form URL: The extension you want to use for the form (e.g. if you were creating the Lease Renwal Date form you would input **leaserenewa**l).



4. Click **Save & Next.**

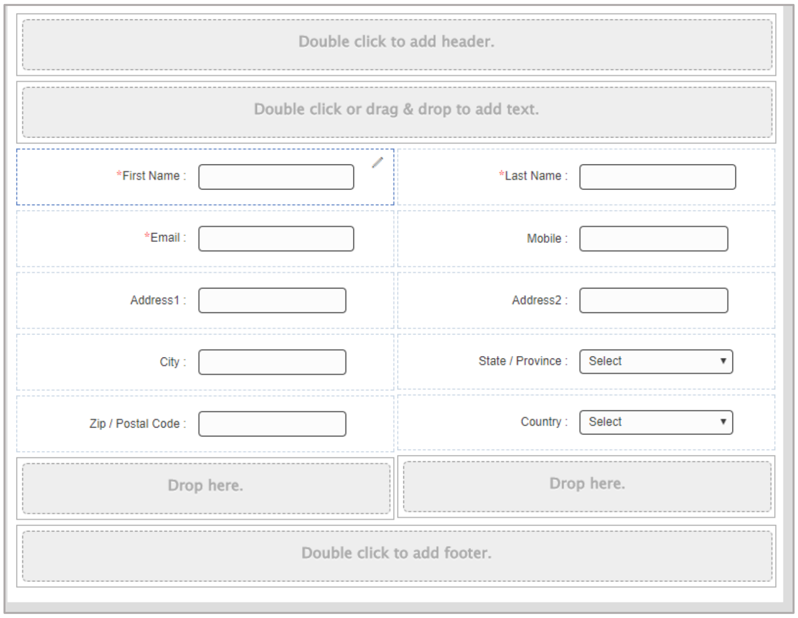
5. The First Name, Last Name and Email will appear as required fields. The remaining fields of the form will need to be added. From the left-hand column, Available Fields, expand the area you want to add fields from. This list includes all the fields available for locations in Info Manager – if you added tabs or fields, you should see them in this list.



6. Click on the field you want to move to the form, drag and drop it into one of the boxes that say "drop here."

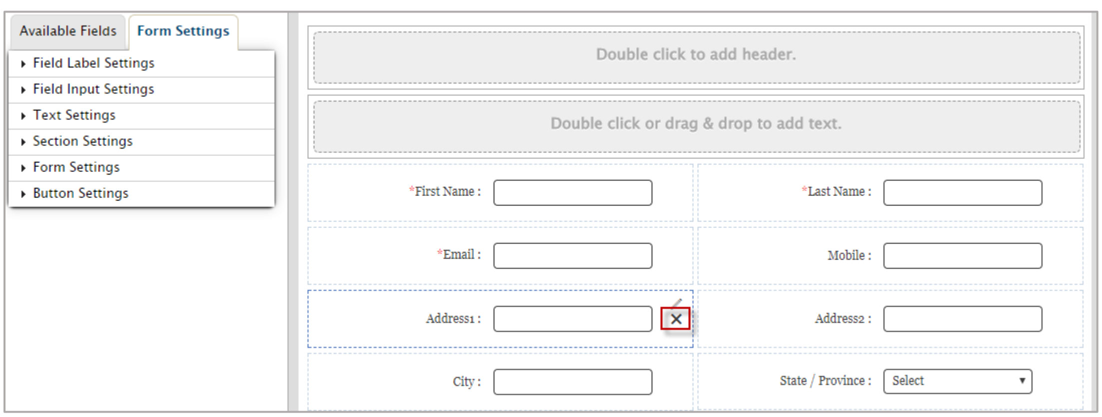
Note: On an Info Manager form, the Franchise ID field is always included, so that FranConnect knows which franchise record this data applies to. If you use this form on a web page or as a direct link in an email you send out, franchisees will need to select their Franchise ID on this page. To pre-fill this by Franchisee, include the web form in a Campaign – FranConnect will know who the email went to and pre-fill that field.

7. Continue to drag and drop fields until the form contains all of the information you want to capture.



8. If you want to add sections to your form, you can do so by selection **Add Section**.

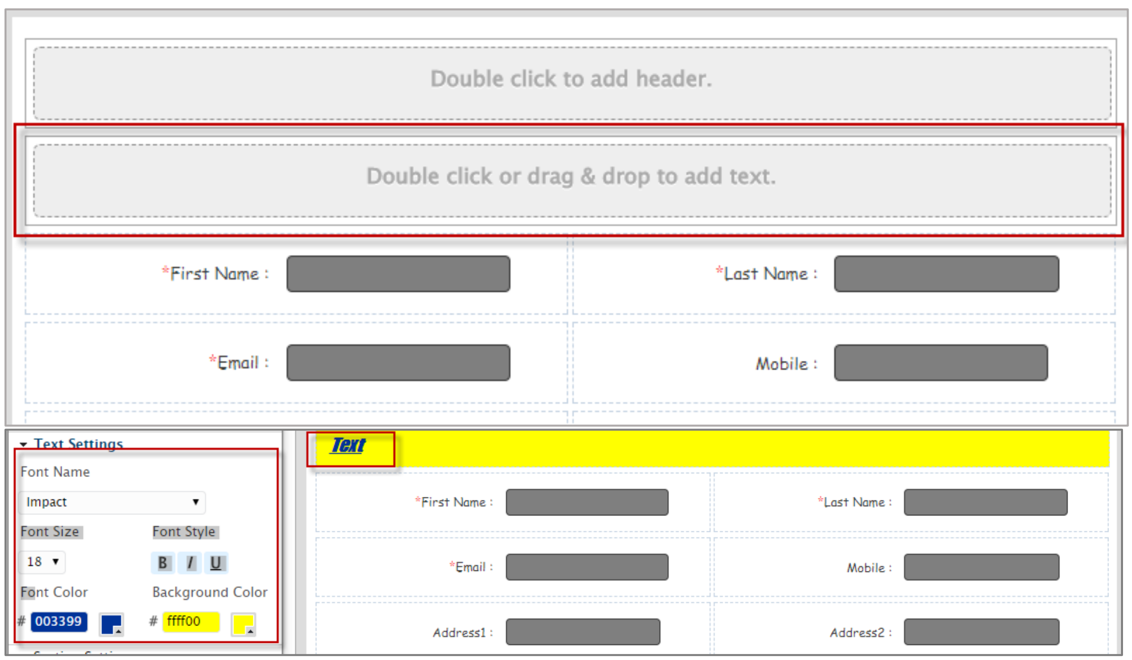
9. You can remove fields by hovering over the field and deleting by using X.



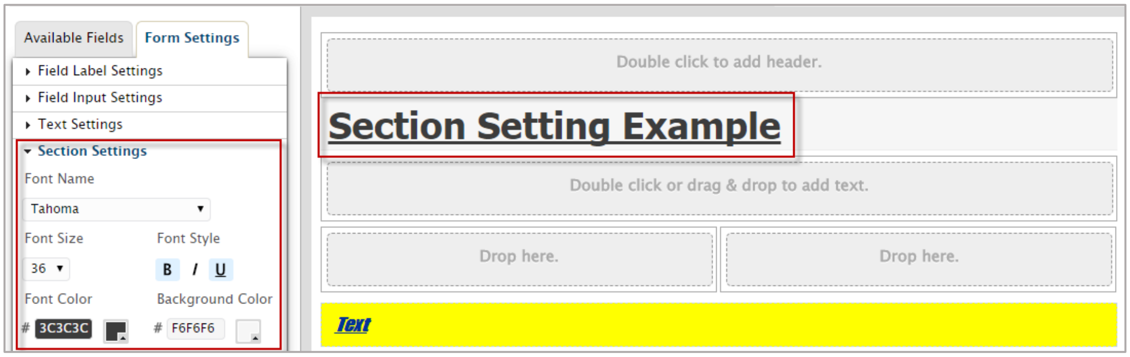
10. From the left-hand column, select **Form Settings.** Use the settings to make edits to the form appearance.
    - Field Label Settings: Allows you to change the font options for the field's labels.

    - Field Input Settings: Allows you to change the font options for the text inside the box (the lead response text).

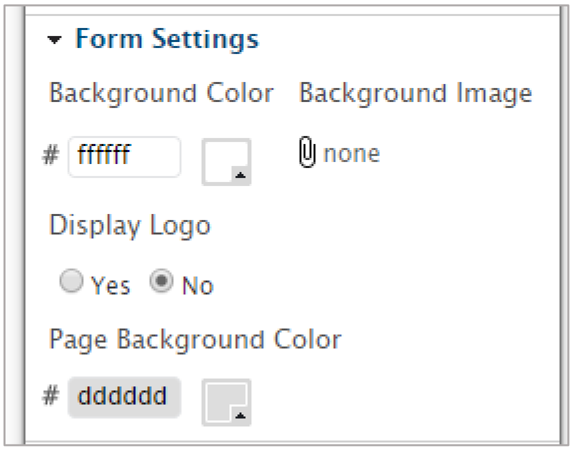
    - Text Settings: Allows you to edit the font text above the form fields.



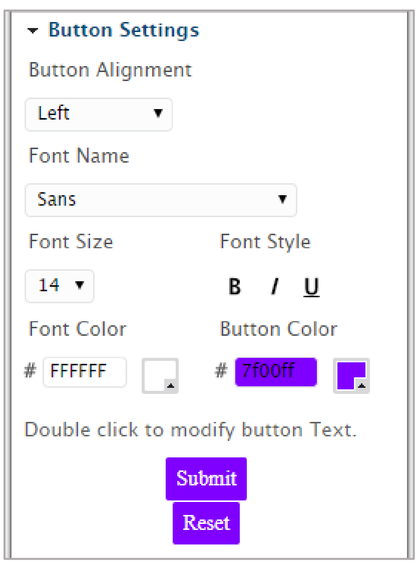
- Section Settings: Allows you to modify the section header font.

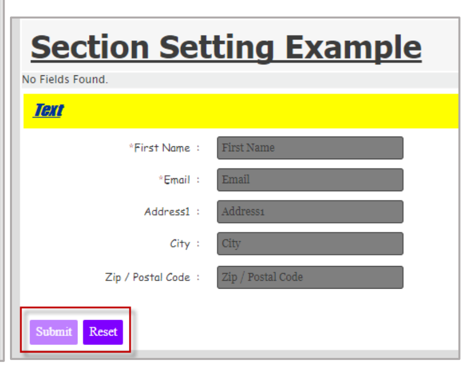


- Form Settings: Allows you to change the background color, background image, display logo and page background color. You will need to know your hex colors for a perfect match to your logo.

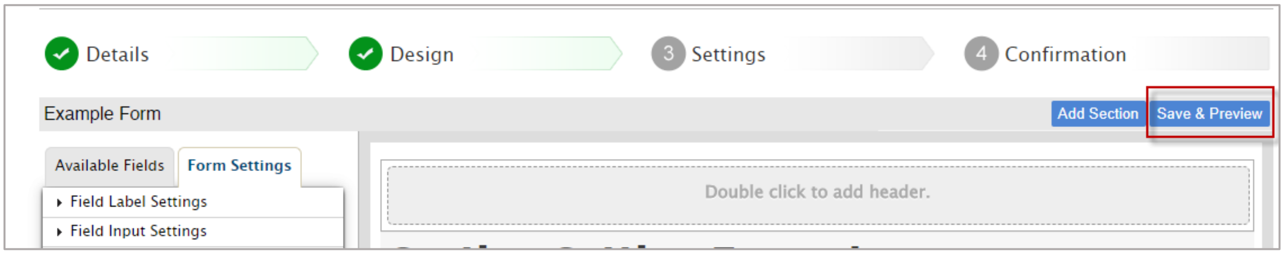


- Button Settings: Allows you to edit the font style and location of buttons on the page.

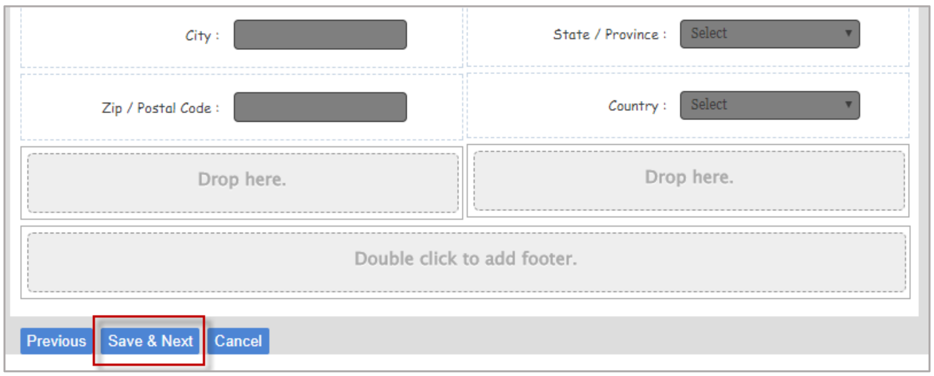




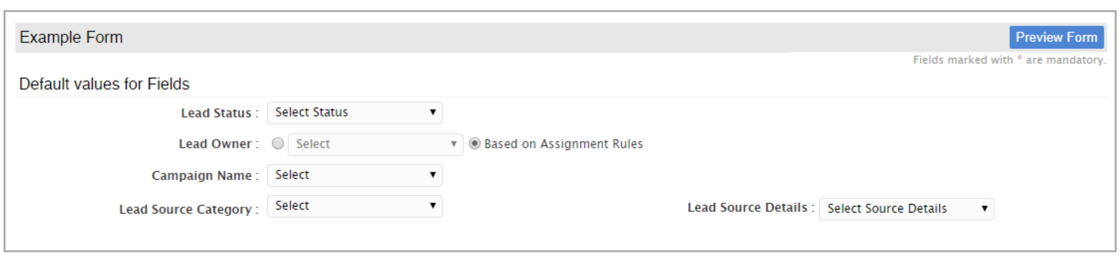
11. When you have completed making edits to your form, click **Save & Preview** to review.



12. If you are happy with your edits click, Save & Next.



13. The Settings page allows you to configure how you want the system to respond once the web form is submitted by the lead. The default fields at the top of the page will prefill for the lead with the values you configure. The lead will receive the message you configure at the bottom of the page after they submit the form. If you plan to use a Workflow with the form you are creating, the top of the page can be left without selections as seen below.



14. Click **Finish**.
15. Once you have completed the design of the form, the Confirmation page will present you with the IFrame Embed Code or the Host URL. Use the IFrame Embed Code to input the form on your

webpage (you may need to provide it to your web designer). Use the Host URL as a hyperlink for use in an Email Template or marketing message.

16. Click **OK**. You will be taken back to the Manage Web Form Generator page.

Make Campaigns to Trigger Updates

Using the Info Mgr Campaign Center

Campaigning Franchisees

Campaigning your franchisees is a great way to keep them up to date with things that are going on inside the franchise organization. The basis for any campaign is the template or email.

Best Practices for email templates

When designing email templates, keep in mind that you're sending to a wide variety of recipients, and you want your message to get into the most inboxes possible (not to be trapped by spam filters), and to look good to the most people when it gets there, so that they can and will read it. Once they have read it, you want to point them smoothly to the action you want them to perform.

Template Contents and Design

Grab Them in the Subject Line: Pay special attention to the subject line of your email, since that may be all of it that your contacts see at first. Customize the subject line to be relevant to your call to action, and have a personal connection to the contact. Use the keyword in your subject line if possible to make to personalize your appeal.This will help to improve the delivery rate of your campaign and reduce the rate at which it gets trapped in spam filters.

Keep it compact: many emails come back undeliverable due to size restrictions by the recipients' servers. To maximize successful delivery, try to keep the whole email size (including attachment, if any) within 5 MB. Ideally, Email contents for email marketing should be less than 1 MB.

Image-to-Text ratio: A 60/40 text to image ratio should be maintained for best results. Recipients are less engaged with long, text-heavy emails, and lots of text can prevent them from easily seeing and heeding your call to action. Image file sizes need to be considered because a mobile device will not load images as fast as a desktop or laptop. Large images in your template and large attachments will impact the email's size, and therefore the delivery success rate of your campaign. Try to keep the size of each image at 20k or less. Do not use Flash or gif animations - they won't work and just add to the overall file size of the email.

Recommended image sizes for email templates:

- Banner image width - 600px
- Image size for one column - 574px
- Image size for two column - 274px
- Image size for three column - 174px
- Recommended file size - below 1mb (not more than 5mb)
- Recommended file resolution - 72 PPI
- Color mode - RGB
- File Type - JPG, PNG

Optimize your calls-to-action (CTAs) - In the email content, there should be very specific and limited "Call to Action" links or buttons. Emails containing more links are often marked as spam based on recipient server spam filter settings.

Keywords: using keywords can give your email a personal touch, but for large campaigns they can also slow down the delivery rate of emails. Use fewer keywords based on email content ratio, and your campaigns will be sent at a faster rate.

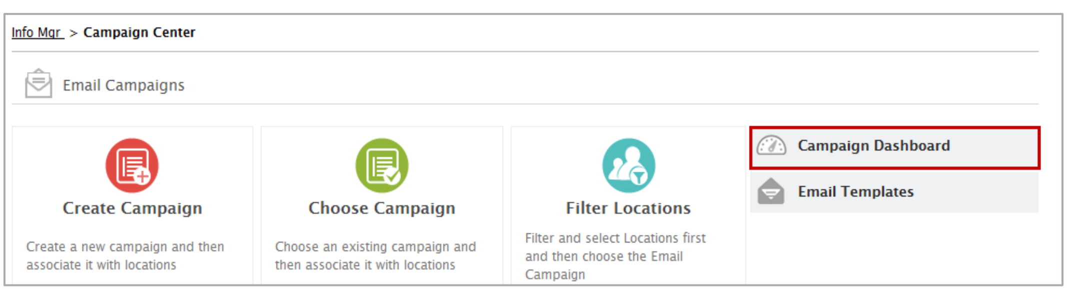
Alt tag usage - Alt tags are snippets of text related to an individual image that are commonly used in email so that before an image loads, the user has an idea of what the image is, what the offer might be, or the overall theme of the email. You can define alt text in the template using the editor.

Save time and reinforce your branding by re-using Existing Templates - Select an existing template and use 'Copy and Customize' to create a new template. *Don't forget to change the subject line and make sure to update the email subject to make it more personalized*

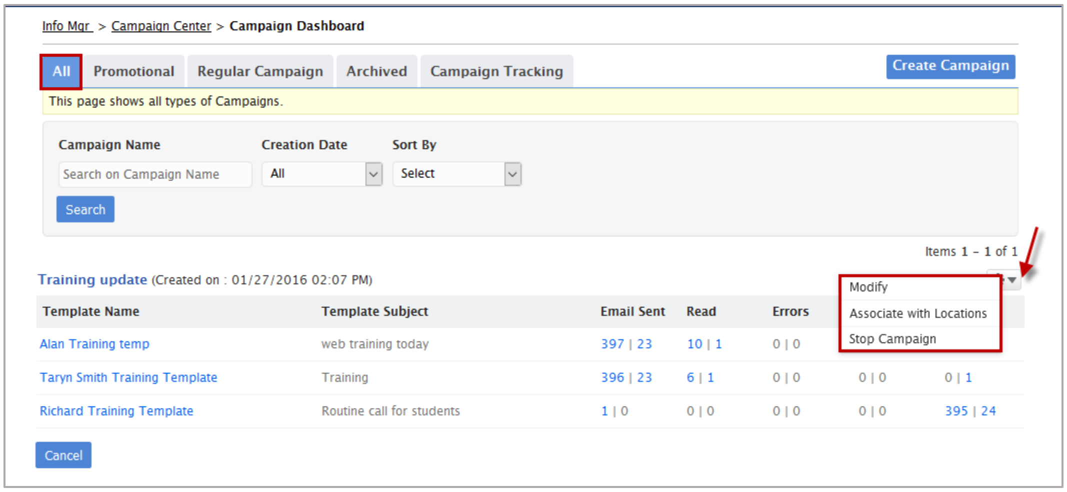
Creating a Franchisee Campaign

1. Click on the **Information Manager** module, and select **Campaign Center** page.

2. Click on **Campaign Dashboard**.



3. When you click on the **Campaign Dashboard**, the following screen will appear:



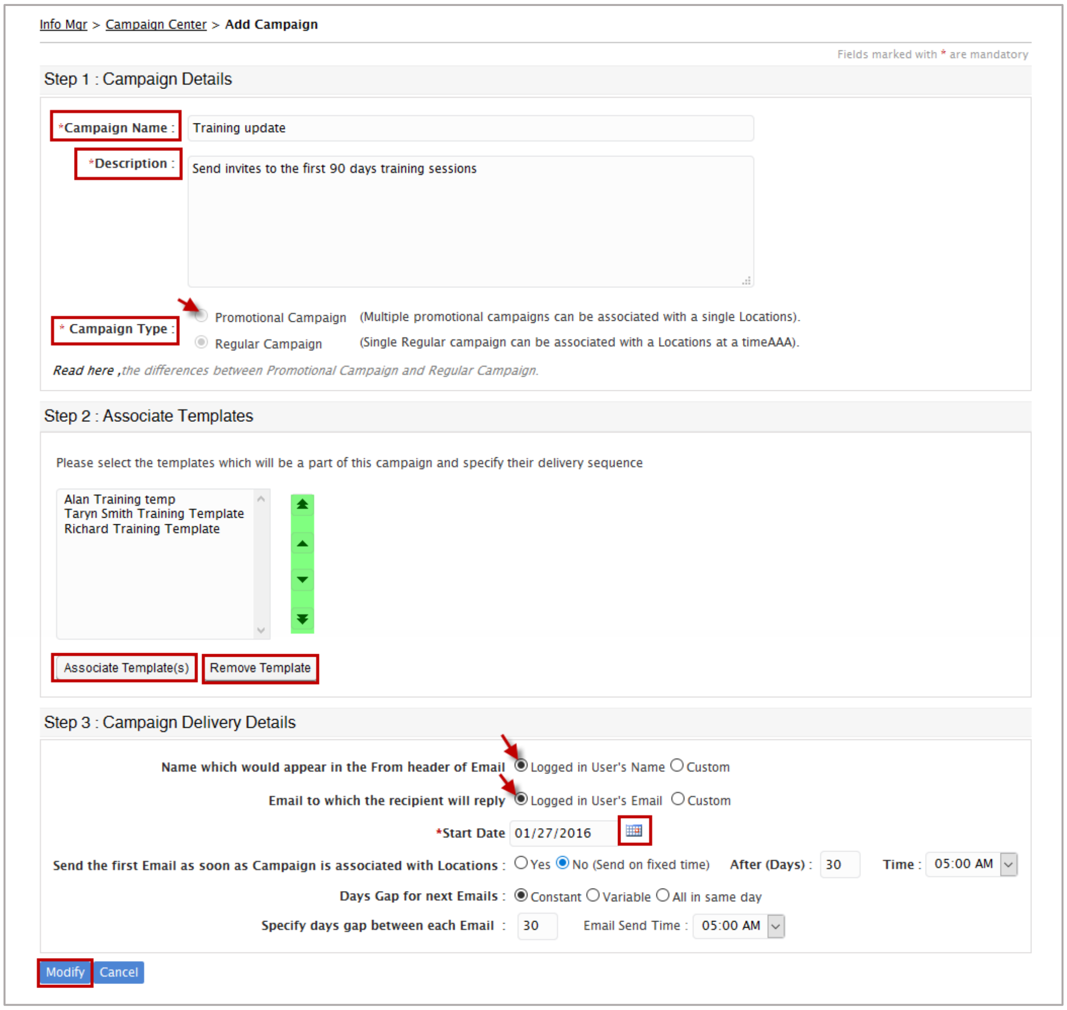
All: The list of all created campaigns will be displayed here.
Promotional: The list of all promotional activities and seasonal offers will be displayed here.
Regular Campaigns: The list of all series of templates will be displayed here.
Archived: The list of campaigns which are archived by a user will be displayed here.
Campaign Tracking: All the actions performed on campaigns will be displayed here.

a) Click the desired campaign type and then click on the action wheel.

b) When you click on the **Action wheel**, you will see the options to **Modify**, **Associate with Locations** and **Stop campaign**.

Modify

1. When you click on the **Modify** option, the following screen will appear:



a) Enter the name in the **Campaign Name** field to update the name of your campaign. Enter the description associated with the campaign in the **Description** field.

b) Select the **Campaign Type** by selecting the radio button next to the preferred campaign type.

c) Now select the template which will be a part of this campaign and specify their delivery sequence.

d) To add more template in the list, click **Associate Template** and to remove a template, select the template and click **Remove Template**.

e) The **Name Which Would Appear in the From Header of Email** can be set as Logged in User's Name or can even be customized by selecting the corresponding radio button.

f) **The Email to Which the Recipient will reply** can be set as Logged in User's Email or can even be customized by selecting the corresponding radio button.

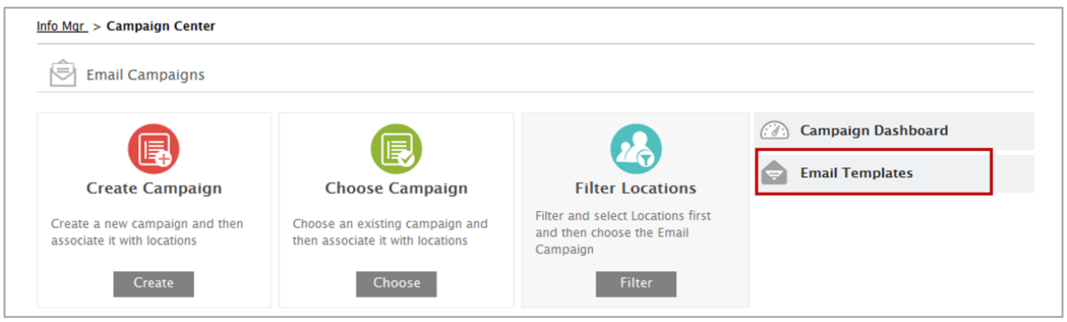
g) To change the start date of the campaign, click on the **Calendar** icon.

h) After updating the details, click **Modify**, or to discard the changes, click **Cancel**.

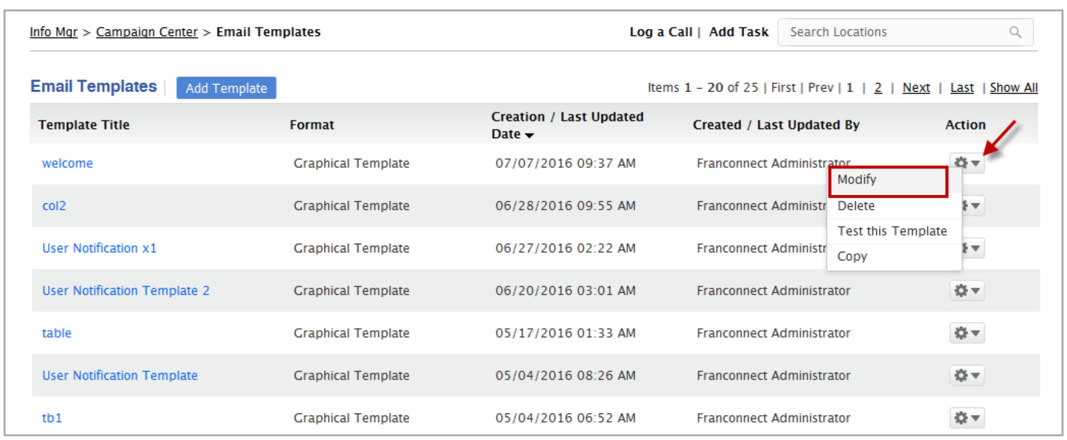
Updating an Information Manager Template

1. Click on the **Information Manager** module, and Select the **Campaign Center** page.

2. Click on **Email Templates**.



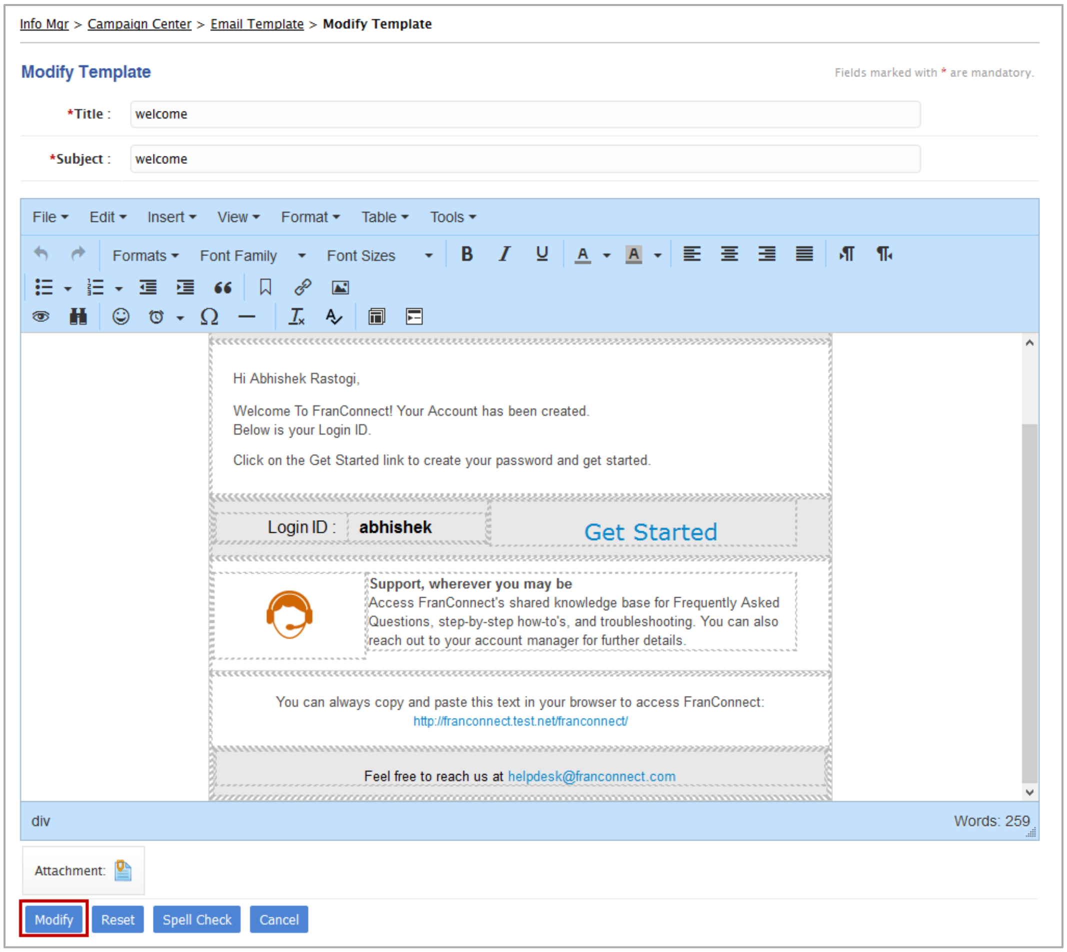
3. When you click on the **Email Templates**, the following screen will appear:



a) Click on a Template name to view information associated with it.

b) When you click on **Action wheel** of any template, you will see the options to **Modify**, **Delete**, **Test**, and **Copy** the template.

c) To update the template, click on the **Modify** button. After clicking the Modify button, you will see the following screen:



Modify the template as per your requirement and click **Modify**.

Editing Email Templates

1. Click on the **Information Manager** module, and Select the **Campaign Center** page.
2. Select **Email Templates.**
3. Choose the template you wish to personalize.
4. From the action wheel Click **Modify.**

5. Make changes as needed to customize the template to your organization.
6. Click **Modify**.

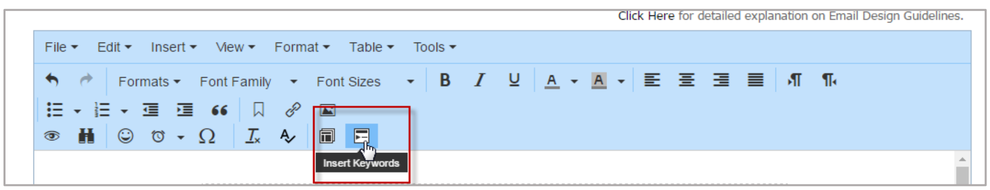
Replacing template text with your franchise information

1. Click on the red text that reads [Your Franchise Name].
2. Delete [Your Franchise Name] and replace it.
3. Click on the red text that reads [Your WebsiteName]
4. Delete [Your WebsiteName] and replace it.
5. Click **Modify** to save your changes. You may need to re-open the template from the action wheel to make further edits.

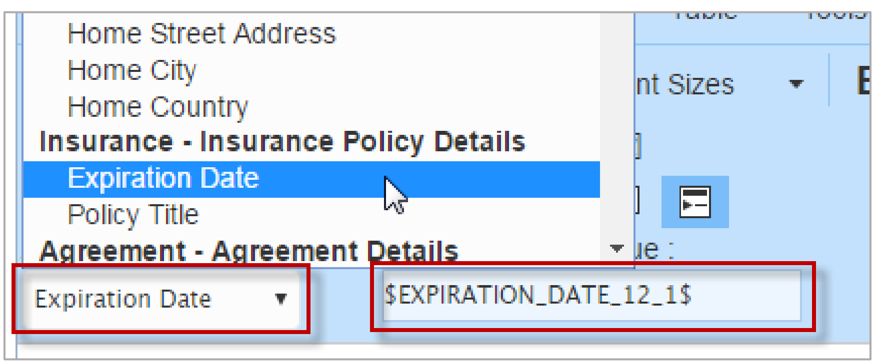
Adding additional desired owner keywords

Keywords are place-holders for specific details that you will include in communications, such as renewal date or insurance expiration date. When the message is sent, the actual information replaces the placeholder, as it would be in a "mail merge" in a word processing system. To insert keywords in a template:

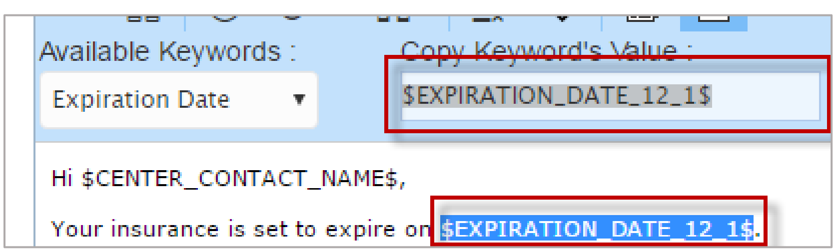
1. Click the **Insert Keywords** icon.



2. Select the keyword you want to enter from the **Available Keywords** dropdown.



3. Copy and paste the keyword into the body of the template.

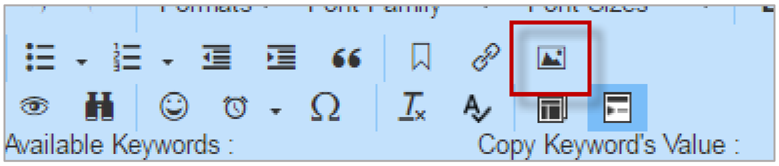


4. Complete any additional edits.

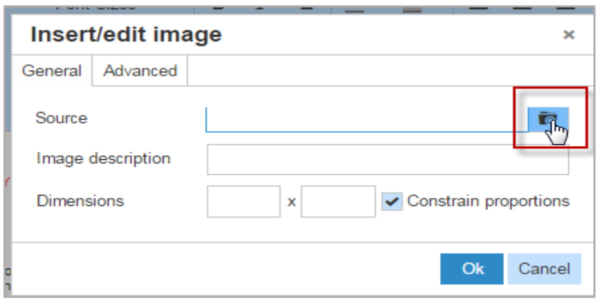
5. Click **Modify**. You may need to re-open the template from the action wheel to make further edits.

Adding Images to templates

1. From the area of the email where you wish to insert a logo or image, click the picture icon.



2. Select the icon to browse your computer.



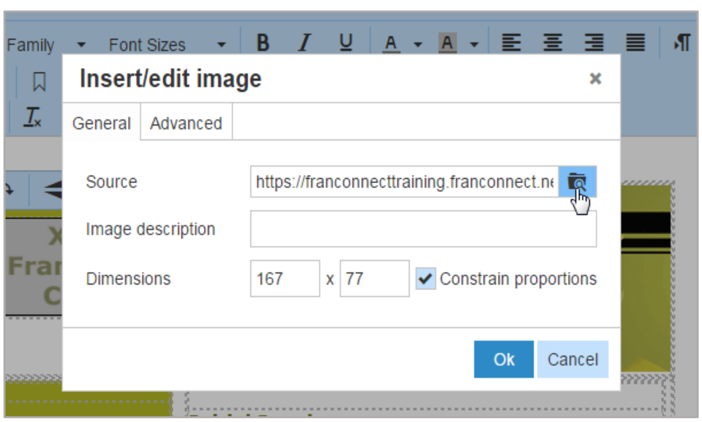
3. Choose your logo from your computer.

4. Click **Open**.

5. Add an **Image description**.

6. Edit the **Dimensions** as needed.

7. Click **Ok**.



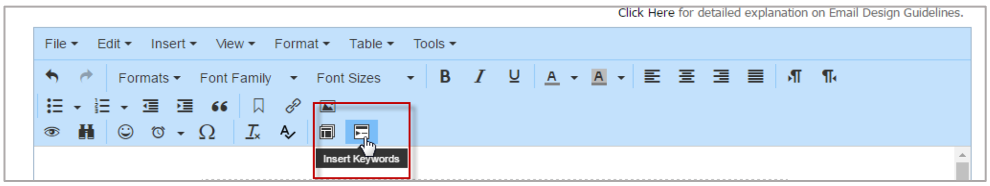
8. Complete any additional edits.

9. Click **Modify** to save this change. You may need to re-open the template from the action wheel to make further edits.

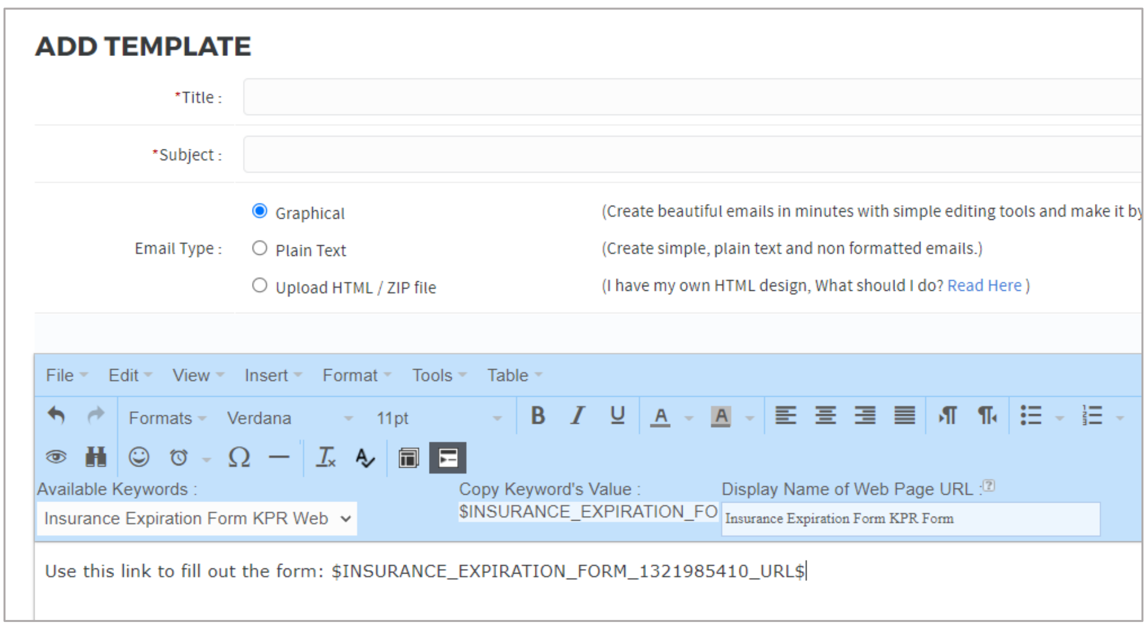
Including Web Forms in Campaigns

When you include a web form in your campaign, there are two ways to include it. Best practice is shown below, where the Franchise ID information is prefilled in the form. NOTE: If you simply include the URL of the form in the email, the franchisee will need to select their unit from a drop-down list. This can lead to data being submitted against the wrong franchise. To insert a web form in an email:

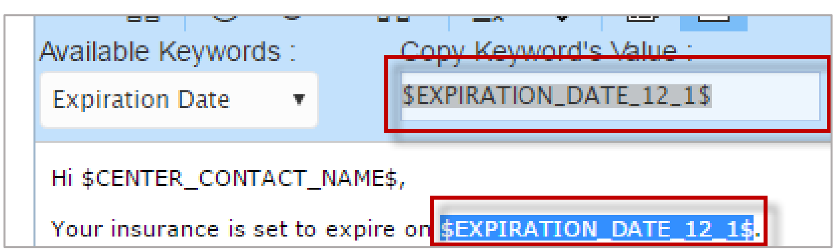
1. Click the **Insert Keywords** icon.



2. In the **Available Keywords** dropdown, you'll be able to select your web form. If the web form is included this way, it will prefill the franchisee information in the form.



3. Copy and paste the form name as though it were a keyword into the body of the template.

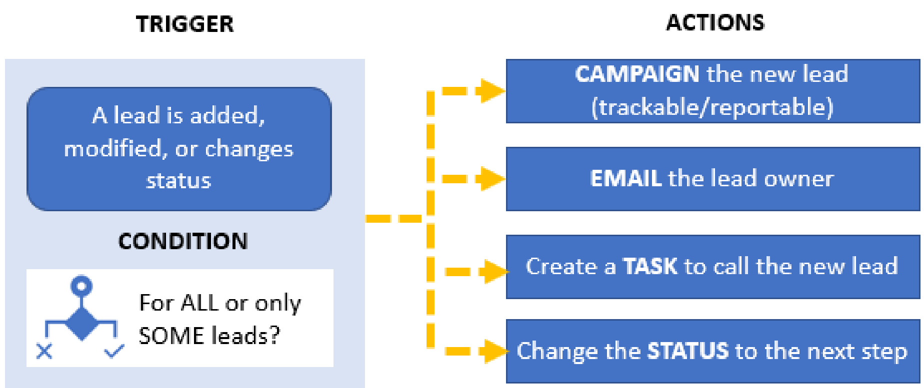


4. Complete any additional edits.

5. Click **Modify**. You may need to re-open the template from the action wheel to make further edits.

Set Workflows to Trigger Campaigns Automatically

Workflows set up actions that can be kicked off automatically, based on another (triggering) action that takes place in FranConnect. You can choose for an action to happen for all leads or locations, or you can have it happen to only seom locations, based on conditions. The illustration below shows an example of what might be automated for a new lead coming into the system.



The **trigger** is the event that kicks off the workflow actions. You can trigger a workflow in different cases, depending on which module you're working in. The chart below shows what triggers can be used in each module that has workflow capability.

Information Manager
Record is added/modified
Based on date associated with record
Events: **Location signs FDD** **Location fills out specified web form** **First activity logged** **Specified campaign is sent** **Call is logged** **Email is sent** **Data update request approved/rejected** **Location transferred/terminated** **Last contacted date is past N days** **Last visit date is past N days** **Visit scheduled/completed** **Customer complaint is logged**

Conditions let you target specific leads or locations to have the action performed. For example, not ALL killed leads would warrant a follow-up campaign, but it might be desirable to send a 90-day follow-up email to leads who were killed for non-response, or who indicated that they were deferring their decision. The chart below shows what conditions can be used in each module that has workflow capability.

Information Manager
Franchisee Type: one or more • **Corporate** • **Active** • **In Development**

Actions are the instructions you give for what happens when the conditions are met. The same workflow can kick off several actions, for example sending an email to a lead and adding a task to the lead owner to follow up with a call. The chart below shows what actions can be used in each module that has workflow capability.

Information Manager
Send Email **Send Campaign** **Create Task**

Create task: You can create a task, designate a task type and a priority, and assign it to the lead owner by role, or to one or more people explicitly from a list. You can schedule that task to happen immediately, after an interval, or have no due date (a "timeless" task).

Change status or candidate portal status: You can advance a lead along the sales pipeline by assigning a new status from the list.

Send email: You can send an email to anyone you designate. Note: typically, this is used for internal emails only, because no tracking statistics apply to an email created in the workflow directly.

Send email campaign: You can set up one email or a series of emails to be sent to recipients you designate. You can also report on the results of the emails, making this a preferred way to send emails to leads or franchisees.

Detailed steps for creating these actions can be found in the Help Center, accessible from the FranConnect product.

Determining which workflow to use

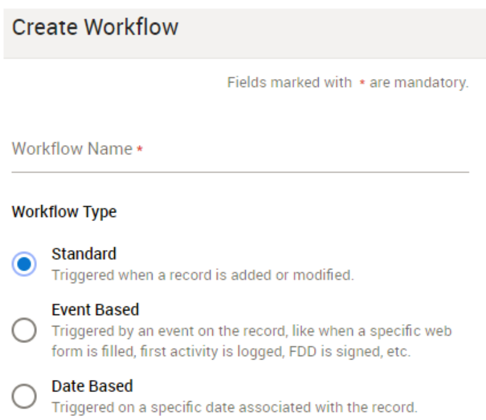
There are three different type of workflows.

1. Standard: Allows you to trigger a system function when a record (Lead) is added, modified or added and modified. This is the most basic workflow and is the foundation for your welcome campaign. For example, when a record is added into FranConnect the Lead will receive the welcome campaign.

2. Event based: Allows you to trigger a system function when an event takes place. This provides for an advanced level of automation. For example, when the Lead fills out the Application Webform, their status is changed to application received and the Lead owner receives a task to review the application.
3. Date Based: Triggered on a specific date associated with a record.

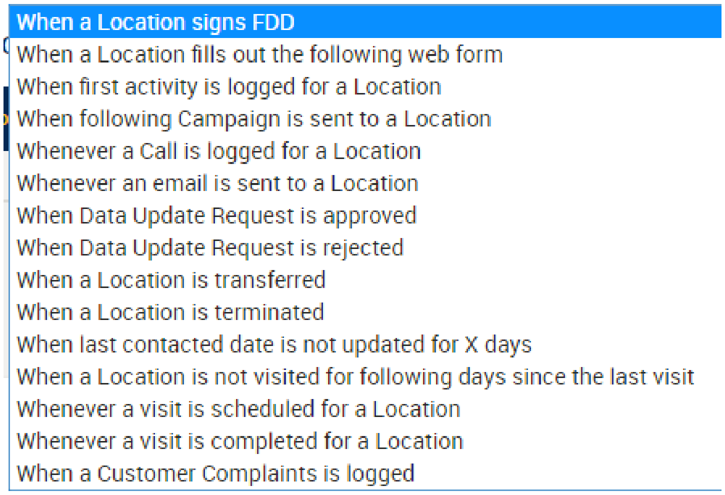
Creating a Workflow

1. From Workflows, click **Create Workflow**.
2. Name the workflow using the **Workflow Name** field. For Example, Application Status Change Workflow.
4. Click **Event Based**. Event based workflows allow you to trigger a system function when a system event takes place. This provides for an advanced level of automation. For example, when the Lead fills out the Application Webform, their status is changed to application received and the Lead owner receives a task to review the application.
5. Click **Next**.



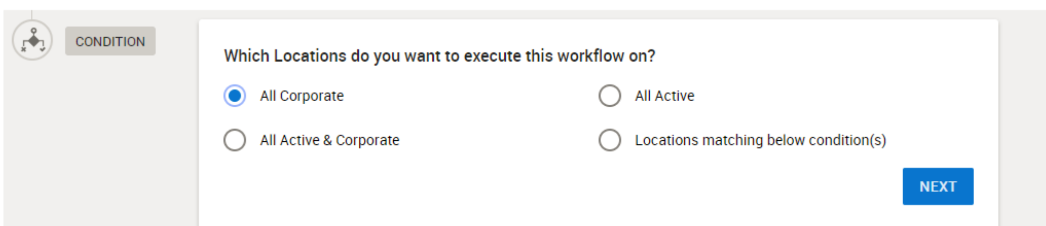
6. First, you'll setup the trigger or when you want the system to execute the workflow.
   a. When the Franchisee signs the FDD Renewal.
   b. When the Franchisees submits the FDD Renewal: This triggers the workflow when the Franchisee completes the FDD Renewal.
   c. When first activity is logged: The workflow will be triggered when your Franchisee's records the first activity.
   d. When following Campaign is sent to an Lead: The workflow will trigger after a certain campaign is sent to a Franchisee.
   e. Whenever the Date for the FDD has expired: The workflow will trigger.

7. If you've selected an option in step 5 that requires you to choose a campaign or form from a list, make that selection now in the drop-down box provided.



8. Click **Next.**
9. You'll be prompted to create the condition for which Leads you want this trigger to apply.

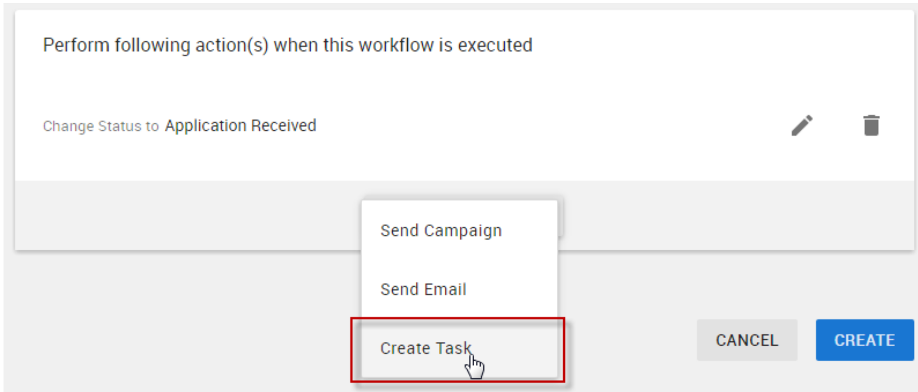
    All Leads: This workflow will apply to all Leads.

    Locations matching below condition(s): This workflow will apply to only those Locations who meet the criteria you set. If you select this option, you will be prompted to create the criteria.

10. Click **Next.**
11. Click **Choose Action.** More than one action can be completed for a single workflow.
    a. Send Campaign: Sends a campaign to all Locations who meet the criteria.
    b. Send Email: Allows you to send an email to someone inside your franchise organization.
    c. Create Task: Allows you to send a task to someone inside your franchise organization. You will use this for the application example used above. Create a task

to go to the Lead owner when the application has been received requiring them to review the application.



12. Click **Create.**