

Springboard to Success

Activities Book – Outline Your Calendar

There are two types of dates that are important for communication between you and your franchisees – corporate events and franchisee lifecycle events. Keeping franchisees notified of these events ensures that no important items are missed.

This book gives you the steps to:

- Make a list of your regularly-occurring events
- Make a list of franchisee anniversary or periodic events
- Prepare the information that you'd like to provide to them

You'll use this information later in our series, when setting up scheduled reminders.

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>.

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List Universal Dates and Franchise-specific Dates

Some events happen at the same time for all franchisees – tax deadlines, your annual conference, certain marketing initiatives, and so on. For these reminders, you'll create **Campaigns** that send one or more emails with information about the upcoming date, and you'll likely trigger them manually soon after you make them.

Other reminders are based on dates that are specific to individual franchises, such as insurance or lease renewals, or redisclosure time for FDDs. In addition to the Campaign that contains the reminder, you'll need to make a **Workflow** that triggers the sending of the campaign at the right time.

Once you have a list of these dates, you can make reminders (Campaigns) for each situation.

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.

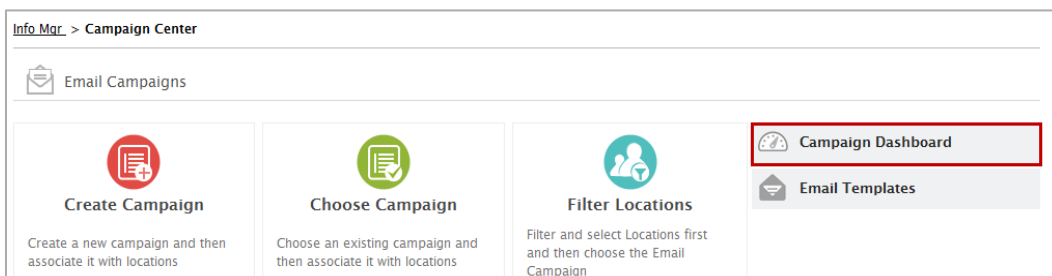
Keywords: using keywords can give your email a personal touch, but for large campaigns they can also slow down the delivery rate of emails. Use fewer keywords based on email content ratio, and your campaigns will be sent at a faster rate.

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:

Info Mgr. > Campaign Center > Campaign Dashboard

All Promotional Regular Campaign Archived Campaign Tracking [Create Campaign](#)

This page shows all types of Campaigns.

Campaign Name Creation Date Sort By
 Search on Campaign Name All Select
[Search](#)

Items 1 - 1 of 1

Training update (Created on : 01/27/2016 02:07 PM)

Template Name	Template Subject	Email Sent	Read	Errors			
Alan Training temp	web training today	397 23	10 1	0 0	Modify		
Taryn Smith Training Template	Training	396 23	6 1	0 0	Associate with Locations	0 0	0 1
Richard Training Template	Routine call for students	1 0	0 0	0 0	Stop Campaign	0 0	395 24

[Cancel](#)

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.

- Click the desired campaign type and then click on the action wheel.
- When you click on the **Action wheel**, you will see the options to **Modify**, **Associate with Locations** and **Stop campaign**.

Modify

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

Info Mgr > Campaign Center > Add Campaign

Fields marked with * are mandatory

Step 1 : Campaign Details

*Campaign Name : Training update

*Description : Send invites to the first 90 days training sessions

* Campaign Type : ☒ Promotional Campaign (Multiple promotional campaigns can be associated with a single Locations).
☐ Regular Campaign (Single Regular campaign can be associated with a Locations at a timeAAA).

[Read here](#) ,the differences between Promotional Campaign and Regular Campaign.

Step 2 : Associate Templates

Please select the templates which will be a part of this campaign and specify their delivery sequence


Alan Training temp
Taryn Smith Training Template
Richard Training Template

Associate Template(s) Remove Template

Step 3 : Campaign Delivery Details

Name which would appear in the From header of Email ☒ Logged in User's Name ☐ Custom

Email to which the recipient will reply ☒ Logged in User's Email ☐ Custom

*Start Date 01/27/2016 

Send the first Email as soon as Campaign is associated with Locations : ☐ Yes ☒ No (Send on fixed time) After (Days) : 30 Time : 05:00 AM

Days Gap for next Emails : ☒ Constant ☐ Variable ☐ All in same day

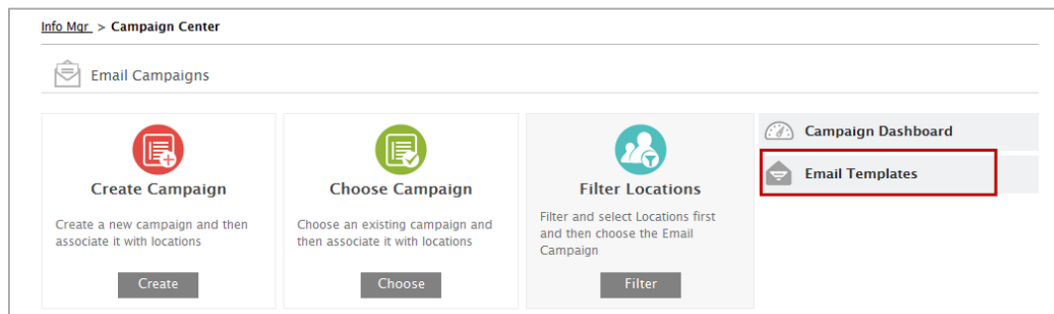
Specify days gap between each Email : 30 Email Send Time : 05:00 AM

Modify Cancel

- 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.
- Select the **Campaign Type** by selecting the radio button next to the preferred campaign type.
- Now select the template which will be a part of this campaign and specify their delivery sequence.
- To add more template in the list, click **Associate Template** and to remove a template, select the template and click **Remove Template**.
- 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.
- 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.
- To change the start date of the campaign, click on the **Calendar** icon.
- 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:

The screenshot shows the 'Info Mgr > Campaign Center > Email Templates' page. It features a table of email templates and an 'Add Template' button. The table has columns for Template Title, Format, Creation / Last Updated Date, Created / Last Updated By, and Action. The 'Action' column contains a gear icon (action wheel) for each template. A red arrow points to the action wheel for the 'welcome' template, which is open, showing options: 'Modify', 'Delete', 'Test this Template', and 'Copy'. The 'Modify' option is highlighted with a red rectangle.

Template Title	Format	Creation / Last Updated Date	Created / Last Updated By	Action
welcome	Graphical Template	07/07/2016 09:37 AM	Franconnect Administrator	[Action Wheel]
col2	Graphical Template	06/28/2016 09:55 AM	Franconnect Administrator	[Action Wheel]
User Notification x1	Graphical Template	06/27/2016 02:22 AM	Franconnect Administrator	[Action Wheel]
User Notification Template 2	Graphical Template	06/20/2016 03:01 AM	Franconnect Administrator	[Action Wheel]
table	Graphical Template	05/17/2016 01:33 AM	Franconnect Administrator	[Action Wheel]
User Notification Template	Graphical Template	05/04/2016 08:26 AM	Franconnect Administrator	[Action Wheel]
tb1	Graphical Template	05/04/2016 06:52 AM	Franconnect Administrator	[Action Wheel]

- 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:

Info Mgr > Campaign Center > Email Template > Modify Template

Modify Template Fields marked with * are mandatory.

*Title : welcome

*Subject : welcome

File Edit Insert View Format Table Tools

Formats Font Family Font Sizes B I U A A


Hi Abhishek Rastogi,

Welcome To FranConnect! Your Account has been created.

Below is your Login ID.

Click on the Get Started link to create your password and get started.

Login ID : **abhishek**
[Get Started](#)



Support, wherever you may be


Access FranConnect's shared knowledge base for Frequently Asked Questions, step-by-step how-to's, and troubleshooting. You can also reach out to your account manager for further details.

You can always copy and paste this text in your browser to access FranConnect:

<http://franconnect.test.net/franconnect/>

Feel free to reach us at helpdesk@franconnect.com

div Words: 259

Attachment: 

Modify Reset Spell Check Cancel

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**.

INSURANCE EXPIRATION LETTER	Graphical Template	09/01/2016 03:51 PM	Elizabeth Colon	Modify	
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5. Make changes as needed to customize the template to your organization.
6. Click **Modify**.

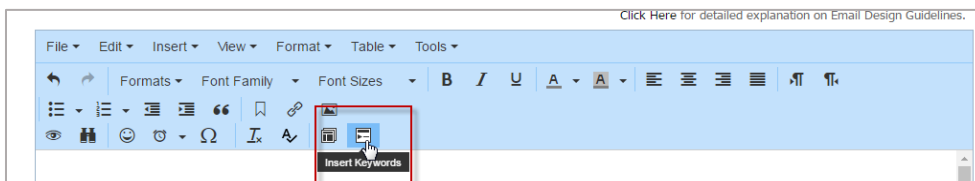
Replacing template text with your franchise information

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.

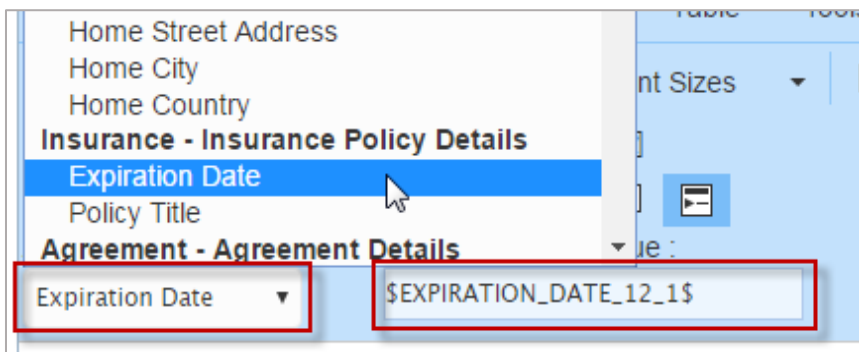
Adding additional desired owner keywords

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:

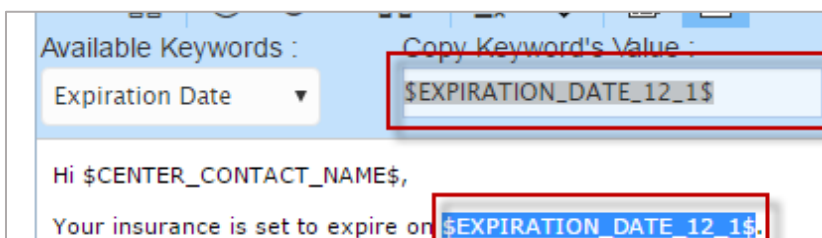
1. Click the **Insert Keywords** icon.



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.

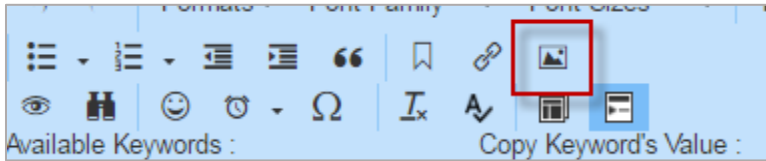


4. Complete any additional edits.

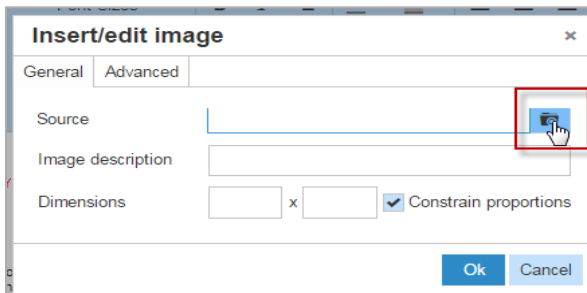
5. Click **Modify**. You may need to re-open the template from the action wheel to make further edits.

Adding Images to templates

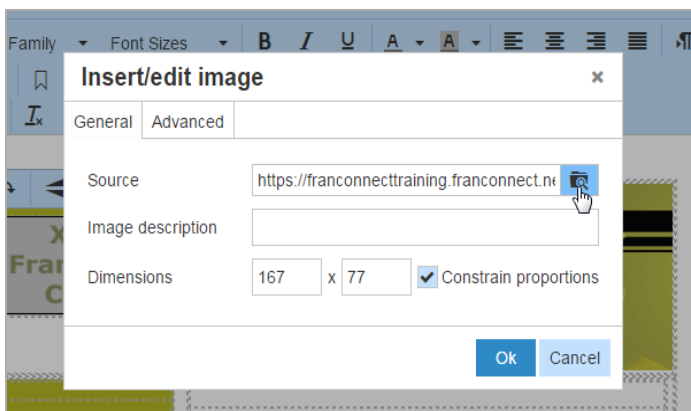
1. From the area of the email where you wish to insert a logo or image, click the picture icon.



2. Select the icon to browse your computer.



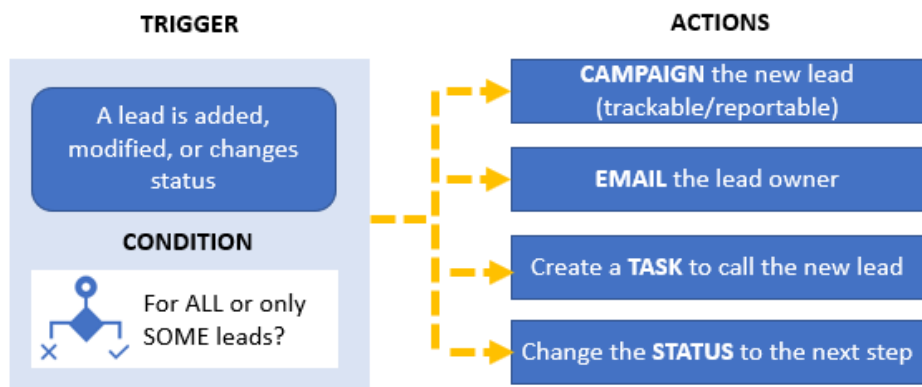
3. Choose your logo from your computer.
4. Click **Open**.
5. Add an **Image description**.
6. Edit the **Dimensions** as needed.
7. Click **Ok**.



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.

About Workflows

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 some 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 <ul style="list-style-type: none"> • 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**.

Create Workflow

Fields marked with * are mandatory.

Workflow Name *

Workflow Type

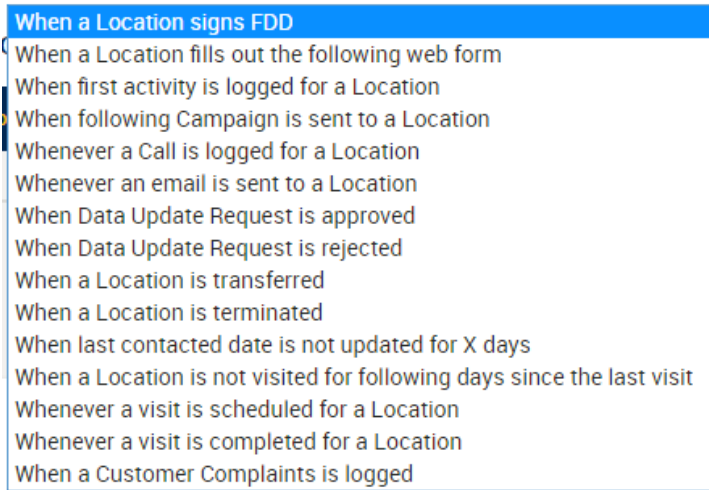
☒ **Standard**
Triggered when a record is added or modified.

☐ **Event Based**
Triggered by an event on the record, like when a specific web form is filled, first activity is logged, FDD is signed, etc.

☐ **Date Based**
Triggered on a specific date associated with the record.

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.

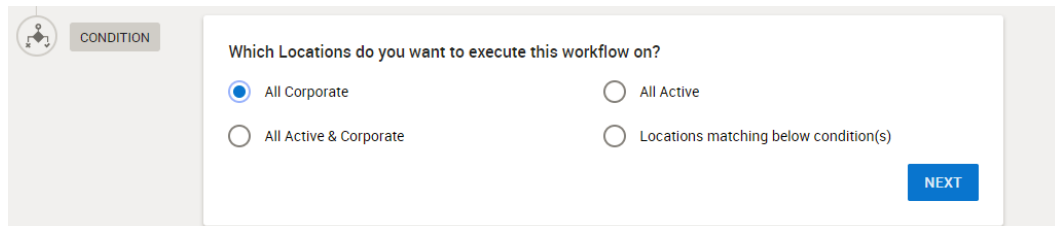


A screenshot of a dropdown menu. The header of the dropdown is "When a Location signs FDD" in white text on a blue background. Below the header, a list of 15 trigger options is displayed in black text on a white background. The options are: "When a Location fills out the following web form", "When first activity is logged for a Location", "When following Campaign is sent to a Location", "Whenever a Call is logged for a Location", "Whenever an email is sent to a Location", "When Data Update Request is approved", "When Data Update Request is rejected", "When a Location is transferred", "When a Location is terminated", "When last contacted date is not updated for X days", "When a Location is not visited for following days since the last visit", "Whenever a visit is scheduled for a Location", "Whenever a visit is completed for a Location", and "When a Customer Complaints is logged".

- When a Location signs FDD
- When a Location fills out the following web form
- When first activity is logged for a Location
- When following Campaign is sent to a Location
- Whenever a Call is logged for a Location
- Whenever an email is sent to a Location
- When Data Update Request is approved
- When Data Update Request is rejected
- When a Location is transferred
- When a Location is terminated
- When last contacted date is not updated for X days
- When a Location is not visited for following days since the last visit
- Whenever a visit is scheduled for a Location
- Whenever a visit is completed for a Location
- When a Customer Complaints is logged

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.



A screenshot of the "CONDITION" step in a workflow builder. On the left, there is a sidebar with a "CONDITION" tab and a "NEXT" button. The main area contains the question "Which Locations do you want to execute this workflow on?" followed by four radio button options: "All Corporate", "All Active", "All Active & Corporate", and "Locations matching below condition(s)". A "NEXT" button is located at the bottom right of the main area.

Which Locations do you want to execute this workflow on?

- ☒ All Corporate
- ☐ All Active
- ☐ All Active & Corporate
- ☐ Locations matching below condition(s)

NEXT

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.

The screenshot shows a workflow configuration interface. At the top, a box contains the text "Perform following action(s) when this workflow is executed". Below this, the text "Change Status to Application Received" is displayed. To the right of this text are two icons: a pencil and a trash can. A dropdown menu is open, showing three options: "Send Campaign", "Send Email", and "Create Task". The "Create Task" option is highlighted with a red rectangular border, and a mouse cursor is pointing at it. At the bottom right of the interface, there are two buttons: "CANCEL" and "CREATE".

12. Click **Create**.