

Springboard to Success

Activities Book – the Rule of Seven

The “rule of seven” says that the prospective buyer should **hear or see the marketing message at least seven times before they buy from you**. How do you manage all those leads on an emerging brand’s budget? Smart automation and personal focus on the hottest leads only is the key.

This book gives you the steps to take action to keep your message in front of your prospects with the minimum amount of repeatable work from your staff – freeing them up for the “people” work of bringing prospects along in the pipeline.

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

Grouping Leads	3
Sales Groups	5
About Sales Groups.....	5
Creating a Sales Group	5
Managing a Sales Group.....	8
Associating a Group with a Campaign	10
Associating a Group with Leads	11
Deleting a Sales Group	13
Archiving a Sales Group	14
Modifying the Criteria of a Sales Group.....	15
Creating an Automated Sales Group	16
Sending a Sales Campaign to a Group	19
Setting Up Campaigns for your Groups.....	22
Campaigns and Workflows	23
About Templates	23
Best Practices for email templates	24
About Campaigns	25
About Recipient Groups	25
About Workflows.....	25
Examples of Campaigns for Leads.....	28
Creating a Sales Campaign	28
Creating a Sales Template.....	31
Changing a Sales Template	32
Using SMS to Market to Leads	32
Creating SMS Campaigns	33
Using Keywords in Templates.....	34
Creating Template Folders.....	34
Automating Campaigns.....	35
Creating Automated Tasks.....	35
Identifying Leads with No Activity	36

Grouping Leads

Having well-defined data sources lets you personalize responses and triage leads as they enter the system, and allows you to analyze the cost-per-lead and cost-per deal later, to allow you to fine-tune your lead source mix.

You may have some older lead sources, or sources that should be consolidated – or broken out – in order to give you a good picture of the actions to take. Here's how to get your lead source list in shape:

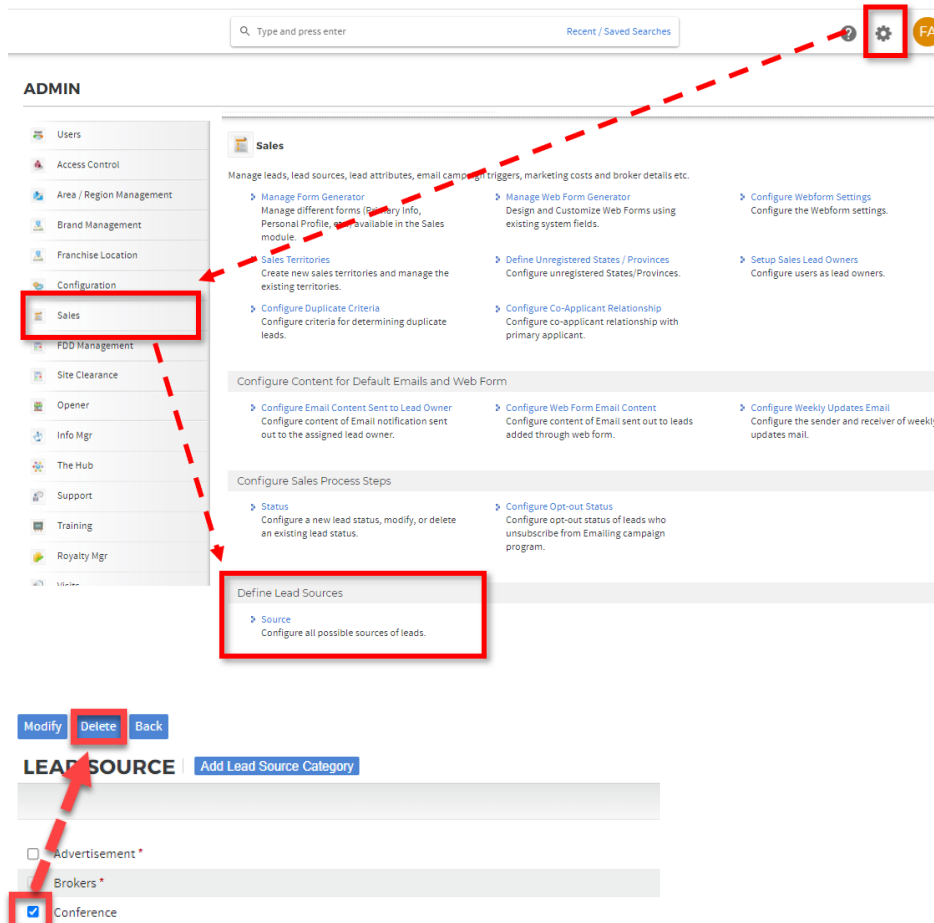
1. Run "Lead Source Report" with Inquiry Date=Last Year

The screenshot illustrates the steps to access the Lead Source Report. On the left, a sidebar menu shows the navigation path: **SALES** (highlighted with a red box) > **Reports** (highlighted with a red box). A red dashed arrow points from the **Reports** menu item to the **REPORT LIST** panel. In this panel, **Lead Source Reports** is highlighted with a red box. Another red dashed arrow points from this menu item to the **Lead Source Reports** section on the right. This section contains a description of the report: **Lead Source Report** (highlighted with a red box) - "this report displays the number of leads that came from each of the sources." Below this, there are sections for **Master Tracking Report**, **Lead Count Reports** (including **Leads per Month Report** and **Leads per Sales Territory Report**), and **Lead Status based Reports** (including **Lead Status Report**, **Lead Time Lines Report**, and **Lead Status Pipeline Report**).

Below the report list, the **Lead Source Report** configuration screen is shown. It includes filters for **View Leads Belonging To**, **Source**, **Source Details**, **Status Category**, **Country**, and **Brand**. The **Inquiry Date** is set to **Last 12 Months** (highlighted with a red box). There are buttons for **View Report** and **Save View**, and a checkbox for **Exclude Co-Applicant Records**.

If a Source in your source list is not on this report, you probably can delete it from your list.

To Delete: **Admin>Sales>Lead Source>Delete** any Category not being used or go into Lead Source Details for each Category and Delete Source Details not being used.



The biggest culprit in bad sources is Lead Source Category=Internet, Lead Source Detail=Other due, since it is often the default for email parsing leads. This can be corrected by making sure the Parsing Email Subject is accurate or asking the lead source to parse in the Category and Details in their email using keywords.

There are a variety of organizations to assist your Franchise in finding qualified sales leads. When you elect to use one of these companies, FranConnect can automatically add the lead into Sales (through Email Parsing) reflecting the correct internet source.

Most Franchise lead generation companies are familiar with the way FranConnect maps leads from their notification email to your FranConnect system so communicating your need to them should not be difficult.

When you onboard a new lead generation company you will provide them with your specific FranConnect email, likely given to you by your Implementation Manager (you can also contact helpdesk@franconnect.com for your FranConnect email). The lead generation company will add this email in the CC or BCC field of the lead emails they send to you. Once FranConnect receives the email it will map the lead details to your FranConnect system and identify the source. For leads to map correctly by source you will want to make sure the lead generation company is listed in the Source page in Admin under Sales. You will also want to be sure the Subject line of their email is correctly reflected in the Email Parsing text box.

Sales Groups

About Sales Groups

Sales Groups help you to group leads for easier contact. Examples of sales groups might be:

- Interest in area we don't serve
- Does not meet financial criteria
- Has interest in buying multiple units

These groups would get different responses (campaigns) when their leads come into FranConnect, directing them to the next steps, for example, an email with the areas we do serve, an email on the financial requirements to own your brand's franchise, or possible direct assignment to the multi-unit rep, if they both express interest and meet the criteria for multi-unit ownership.

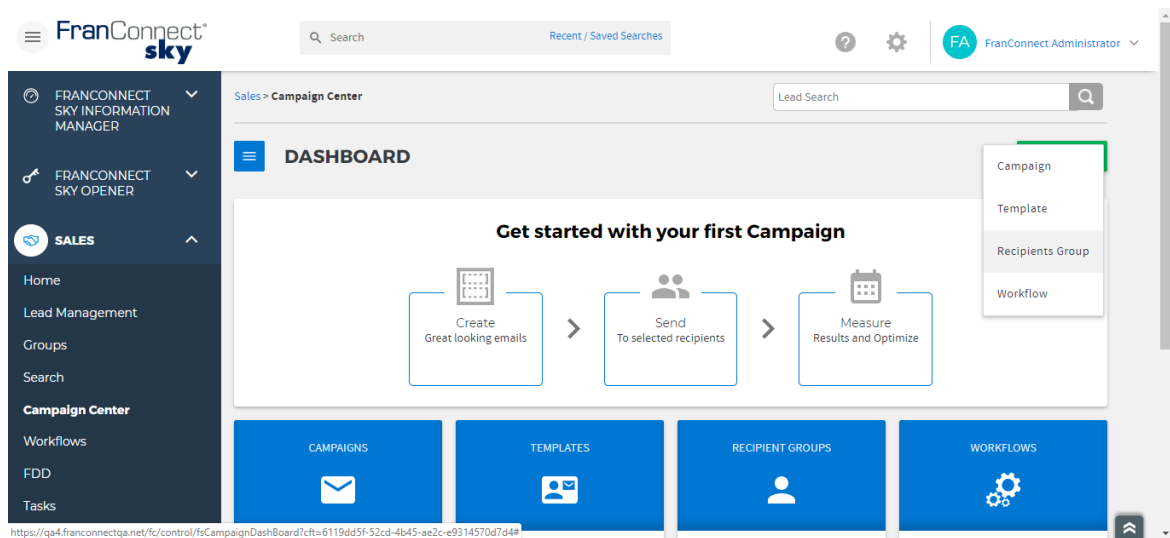
There are two kinds of groups you can create for leads: one is a static group that you assign leads to - so you control the people in that group manually, and thus their communication – and one is a “Smart Group” which will add leads that meet the group's criteria to the group as they come into the system. Smart Groups are typically used for the first two examples above, where the multi-unit example might be a manually controlled group that a rep assigns a lead to after more thorough qualification.

Creating a Sales Group

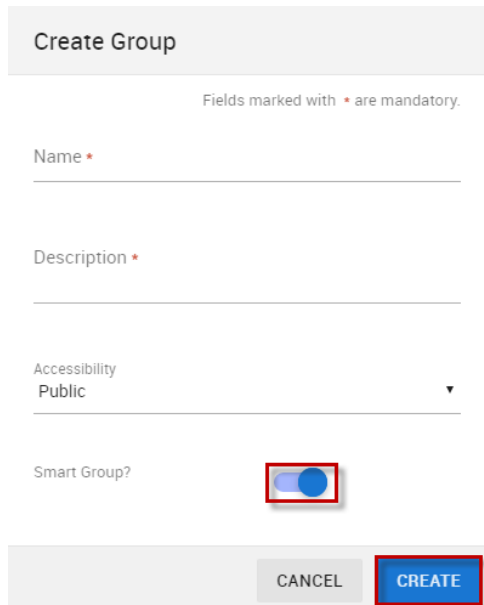
You can create Sales groups to manage your leads. There are two ways to create a sales group, as described below:

From the Campaign Center:

1. Select **Campaign Center** from the **Sales** module.
2. Click the Create + button and select Recipients Group.



3. Provide a name and description for the Group. Also, set an accessibility by choosing between **Public** and **Private**.



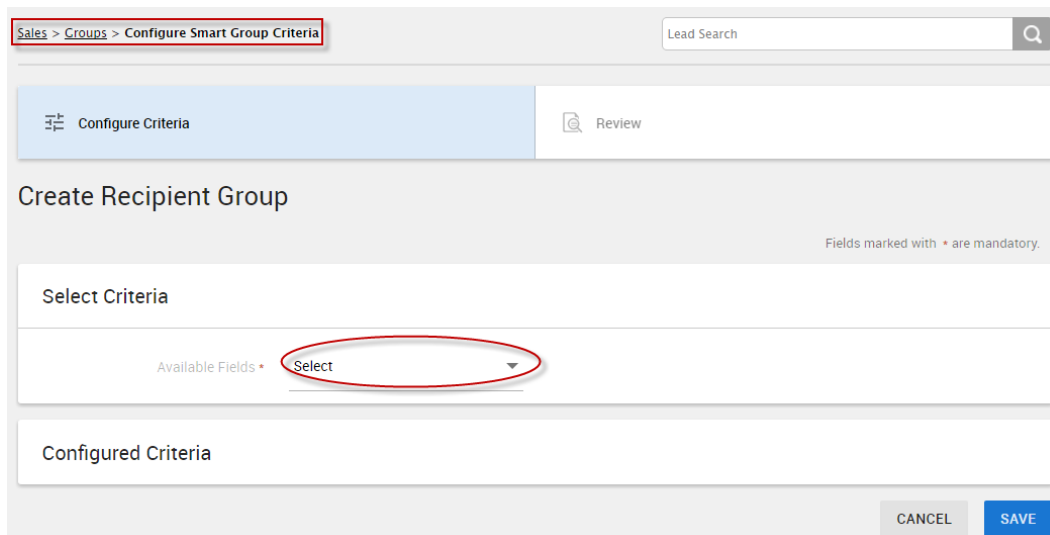
The 'Create Group' form includes the following elements:

- Create Group** (Section Header)
- Fields marked with * are mandatory.
- Name *** (Text input field)
- Description *** (Text input field)
- Accessibility** (Dropdown menu with 'Public' selected)
- Smart Group?** (Toggle switch, currently turned on)
- CANCEL** and **CREATE** (Buttons)

4. To make the group a **Smart Group** enable the toggle button. You can set a criterion for a smart group and the leads which fulfil the criterion move to the group automatically.

5. Click **Create**.

6. Set the criteria for your Group by selecting the required fields from the **Available Fields** drop-down.



The 'Configure Smart Group Criteria' form includes the following elements:

- Sales > Groups > Configure Smart Group Criteria** (Breadcrumbs)
- Lead Search** (Search bar)
- Configure Criteria** and **Review** (Tabs)
- Create Recipient Group** (Section Header)
- Fields marked with * are mandatory.
- Select Criteria** (Section Header)
- Available Fields *** (Dropdown menu with 'Select' selected)
- Configured Criteria** (Text input field)
- CANCEL** and **SAVE** (Buttons)

7. Provide further details of the selected criteria in the **Configured Criteria** field and click **Save**.

Sales > Groups > Configure Smart Group Criteria

Lead Search

Configure Criteria Review

Create Recipient Group

Fields marked with * are mandatory.

Select Criteria

Available Fields * Last Name

Configured Criteria

Primary Info > Last Name

Contains

- Equals
- Contains
- Starts With
- Ends With
- Does Not Equal
- Is Empty
- Is Not Empty

Enter value here according to your selection

CANCEL SAVE

8. An alert message appears. Click **OK** to set the configured Smart Group criteria.

franconnect.test.net says:

Are you sure you want to set the configured Smart Group Criteria?

☐ Prevent this page from creating additional dialogs.

OK Cancel

9. Your configured criteria along with the number of leads which match the criteria is shown on the **Confirmation** screen below:

Sales > Groups > Confirmation

Lead Search

Define Criteria Review

Create Recipient Group

Field Name	Criteria	Value
Primary Info > Last Name	Contains	P

Group Details	
Name	SalesLead
Description	Test
Accessibility	Public

Check the checkbox to add existing leads matched your given criteria

1879 existing Lead(s) matched the defined criteria.
Not checking this will only add future Lead that match the configured criteria.

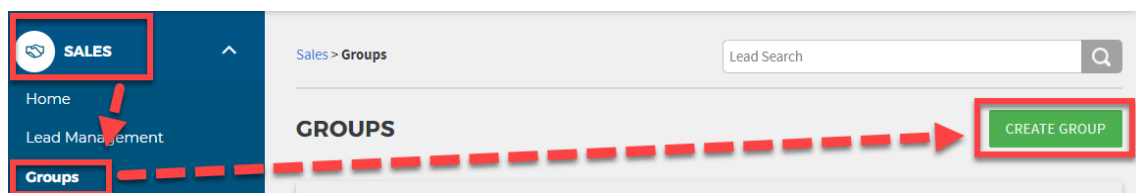
CANCEL SAVE MODIFY CRITERIA

10. Select the checkbox next to the matching leads to move them to the created Group and click **Save**.

From Groups:

1. Select **Groups** from the **Sales** module.

2. Click the **Create Group** button.



3. For creating a Sales Group, follow the steps 3-10 described above.

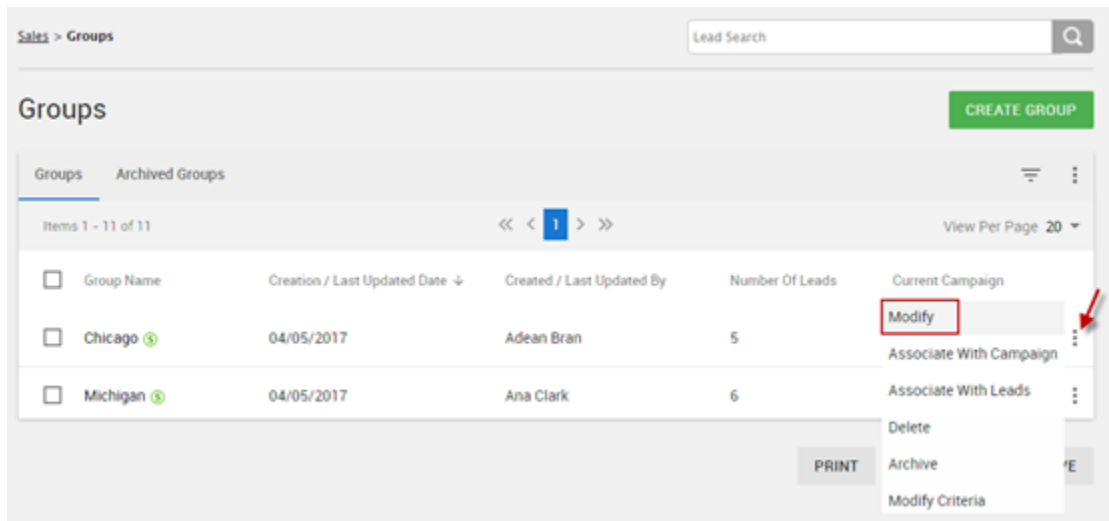
Managing a Sales Group

You can manage a Sales Group by performing various actions, as described below:

Modifying a Sales Group

1. You can modify a sales group directly from the **Groups** page or by navigating to **Sales > Campaign Center** and selecting **Recipient Groups**.

To modify the details of a Group, click the corresponding More actions icon and select **Modify**.



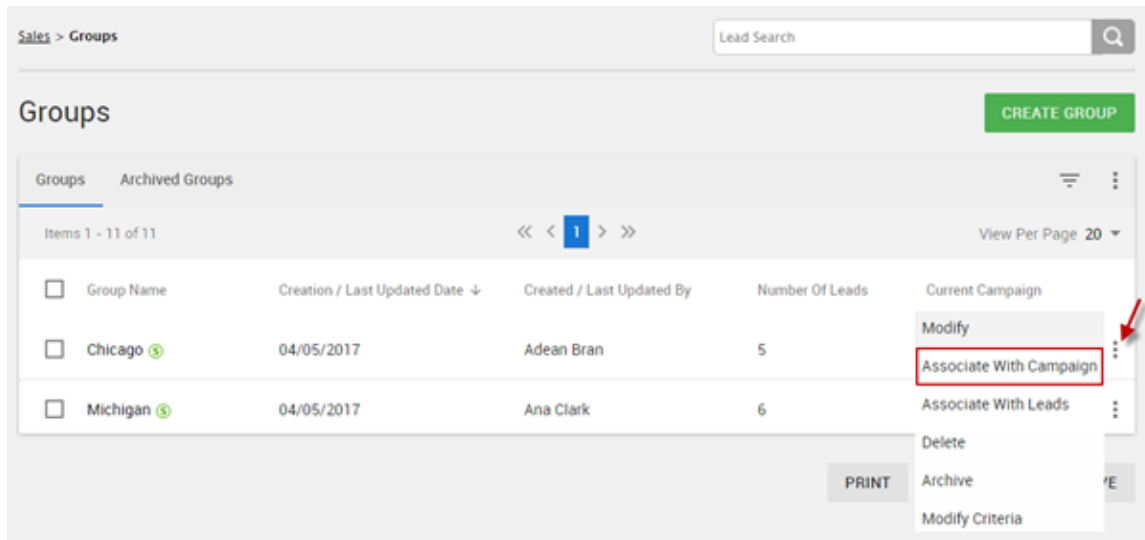
The following **Modify Group** screen appears. You can only modify the Group Name and Description from here, the Accessibility and Smart Group fields are disabled.

The 'Modify Group' form is displayed. It has a title 'Modify Group' and a note 'Fields marked with * are mandatory'. The form contains four fields: 'Name *' with the value 'New Leads (Drip Campaign)', 'Description *' with the value 'This is the drip campaign for new leads.', 'Accessibility' with a dropdown menu set to 'Public', and 'Smart Group?' with a toggle switch. At the bottom, there are 'CANCEL' and 'MODIFY' buttons. The 'MODIFY' button is highlighted with a red box.

Click **Modify** to save the changes.

Associating a Group with a Campaign

1. Click the more actions icon corresponding to a group name and select **Associate with Campaign**.



Sales > Groups

Lead Search

Groups Archived Groups

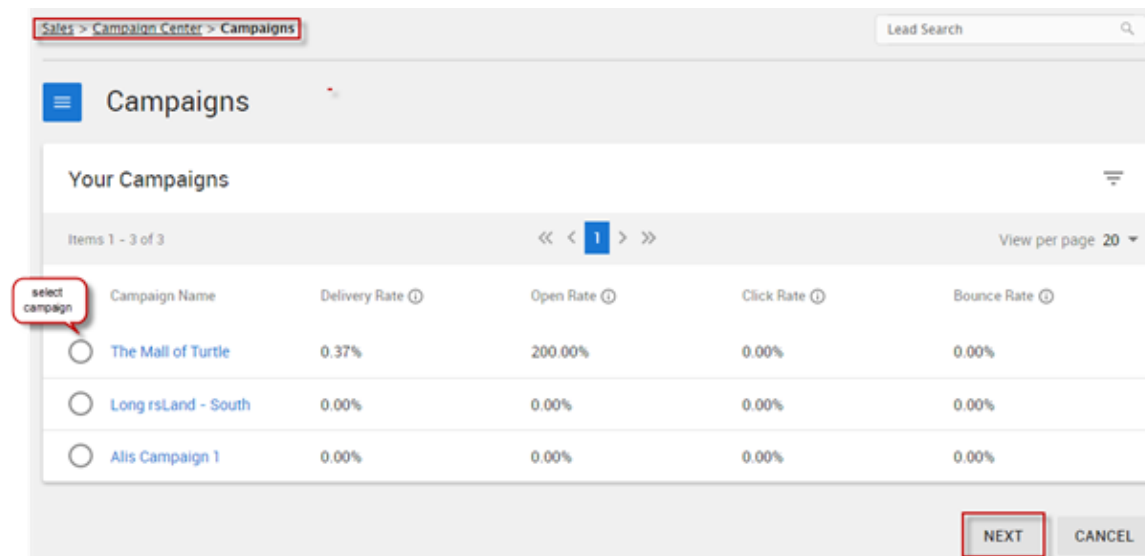
Items 1 - 11 of 11

View Per Page 20

<input type="checkbox"/>	Group Name	Creation / Last Updated Date ↓	Created / Last Updated By	Number Of Leads	Current Campaign
<input type="checkbox"/>	Chicago	04/05/2017	Adean Bran	5	Modify Associate With Campaign Associate With Leads
<input type="checkbox"/>	Michigan	04/05/2017	Ana Clark	6	Delete Archive Modify Criteria

PRINT

2. Select a campaign to associate with the Group and click **Next**.



Sales > Campaign Center > Campaigns

Lead Search

Campaigns

Your Campaigns

Items 1 - 3 of 3

View per page 20

<input type="radio"/>	Campaign Name	Delivery Rate ⓘ	Open Rate ⓘ	Click Rate ⓘ	Bounce Rate ⓘ
<input type="radio"/>	The Mall of Turtle	0.37%	200.00%	0.00%	0.00%
<input type="radio"/>	Long rsLand - South	0.00%	0.00%	0.00%	0.00%
<input type="radio"/>	Alis Campaign 1	0.00%	0.00%	0.00%	0.00%

select campaign

NEXT CANCEL

3. Click **Confirm** to associate the campaign with the group.

The screenshot shows a 'Confirmation' screen in a web application. At the top, there is a breadcrumb trail 'Sales > Campaign Center > Confirmation' and a 'Lead Search' bar. The main heading is 'Confirmation'. Below this, there are three sections: 'Recipient Details', 'Campaign Details', and 'Template Details'. The 'Recipient Details' section shows 'Total No. of selected leads' as 1, 'Total No. of leads to whom Campaign Email would be sent' as 1, and 'Total No. of leads with whom Campaign cannot be associated' as 0. The 'Campaign Details' section shows 'Campaign Name' as 'Audit Campaign' and 'Campaign Date' as '11/30/2016 12:30 AM'. The 'Template Details' section shows a table with 'Template Name', 'Created By', and 'Last Updated' columns. At the bottom right, there are 'CANCEL' and 'CONFIRM' buttons, with the 'CONFIRM' button highlighted by a red box.

Recipient Details		
Total No. of selected leads		1 Leads
Total No. of leads to whom Campaign Email would be sent		1 Leads
Total No. of leads with whom Campaign cannot be associated (As they have been Opted Out, Opt-In Pending, Opt-In Request not Sent or do not have Email or have email which belongs to bounce/spam list or they are from Unregistered State / Province or already associated with this particular campaign)		0 Leads

Campaign Details	
Campaign Name	Audit Campaign
Campaign Date	11/30/2016 12:30 AM

Template Details		
Template Name	Created By	Last Updated
Educational Template	FranConnect Administrator	11/30/2016
Export & Import Business	FranConnect Administrator	11/30/2016

CANCEL CONFIRM

Associating a Group with Leads

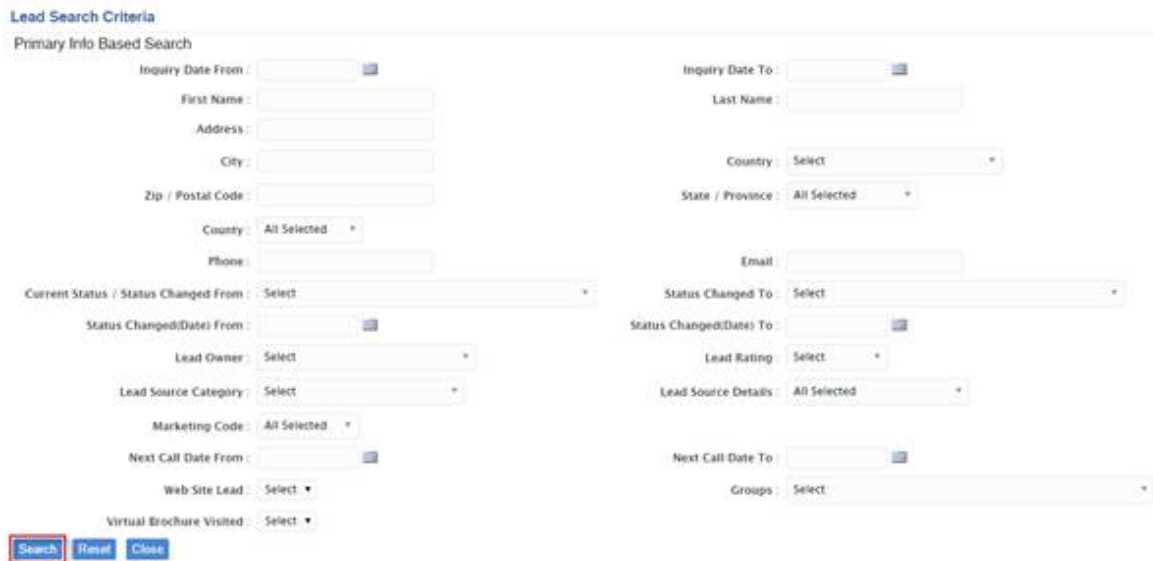
1. Click the more actions icon corresponding to a group name and select **Associate with Leads**.

The screenshot shows a 'Groups' screen in a web application. At the top, there is a breadcrumb trail 'Sales > Groups' and a 'Lead Search' bar. The main heading is 'Groups'. Below this, there are tabs for 'Groups' and 'Archived Groups'. A table lists groups with columns: 'Group Name', 'Creation / Last Updated Date', 'Created / Last Updated By', 'Number Of Leads', and 'Current Campaign'. The table has two rows: 'Chicago' and 'Michigan'. For each row, there is a 'More Actions' icon (three dots) in the 'Current Campaign' column. A red arrow points to the 'More Actions' icon for the 'Michigan' group. A dropdown menu is open for the 'Michigan' group, showing options: 'Modify', 'Associate With Campaign', 'Associate With Leads' (highlighted with a red box), 'Delete', 'Archive', and 'Modify Criteria'. At the bottom right, there is a 'PRINT' button.

Group Name	Creation / Last Updated Date	Created / Last Updated By	Number Of Leads	Current Campaign
Chicago	04/05/2017	Adean Bran	5	Modify
Michigan	04/05/2017	Ana Clark	6	Associate With Leads

PRINT

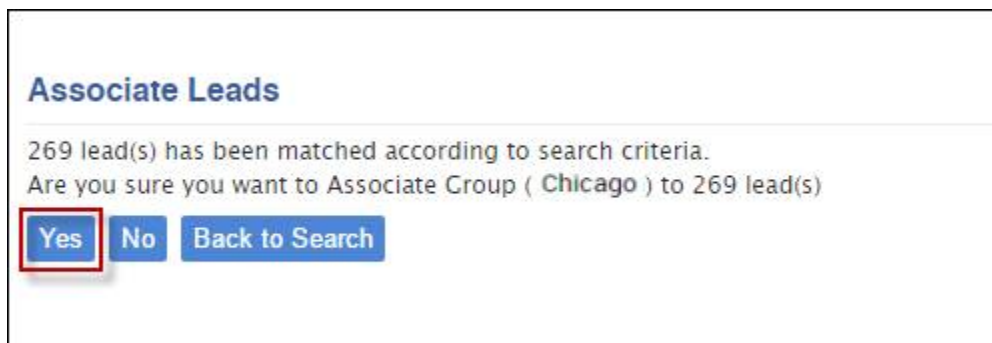
2.You can narrow your leads based on primary information. Fill in the required fields to set the search criteria.



The image shows a 'Lead Search Criteria' form with a 'Primary Info Based Search' section. It contains various input fields for filtering leads, including date ranges, text fields for names and addresses, dropdown menus for country, state, and status, and checkboxes for website leads and virtual brochure visits. At the bottom left, the 'Search' button is highlighted with a red box, along with 'Reset' and 'Close' buttons.

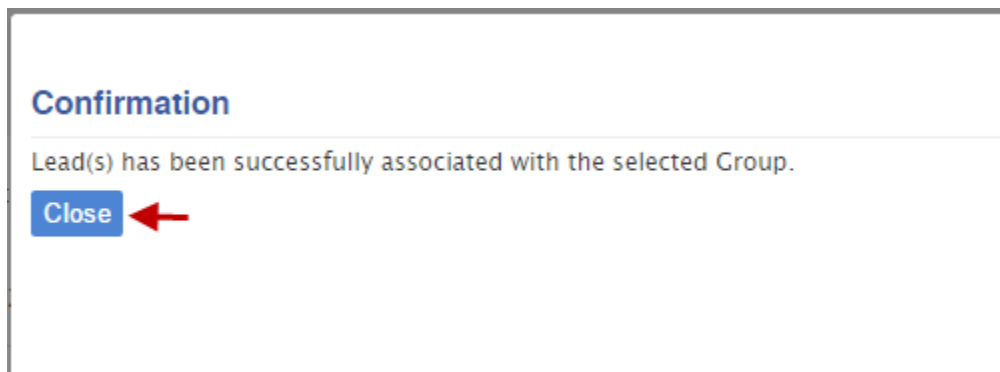
3.Click **Search**.

4.The system will notify you about the total number of leads matching your search criteria. To associate all the leads with the group, click **Yes**.



The image shows a dialog box titled 'Associate Leads'. It informs the user that 269 leads have been matched and asks for confirmation to associate them with the 'Chicago' group. Three buttons are visible: 'Yes' (highlighted with a red box), 'No', and 'Back to Search'.

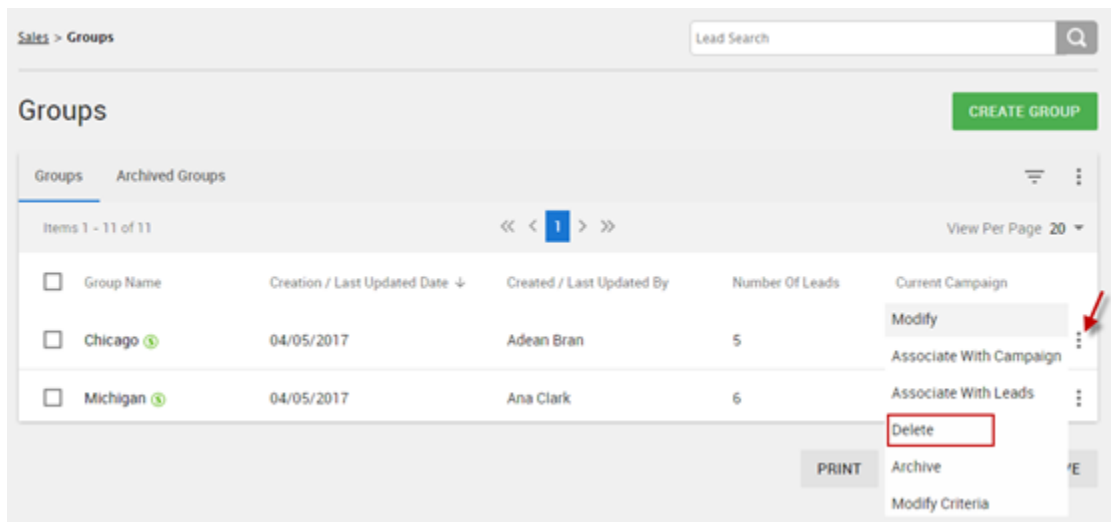
5.Click **Close** to confirm the association.



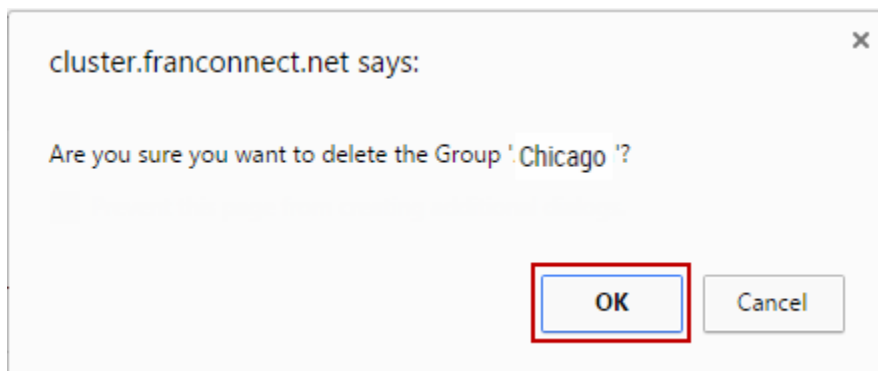
The image shows a 'Confirmation' dialog box stating that the leads have been successfully associated with the selected group. A 'Close' button is present, with a red arrow pointing to it from the right.

Deleting a Sales Group

1. Click the action button corresponding to a group name and select **Delete**.



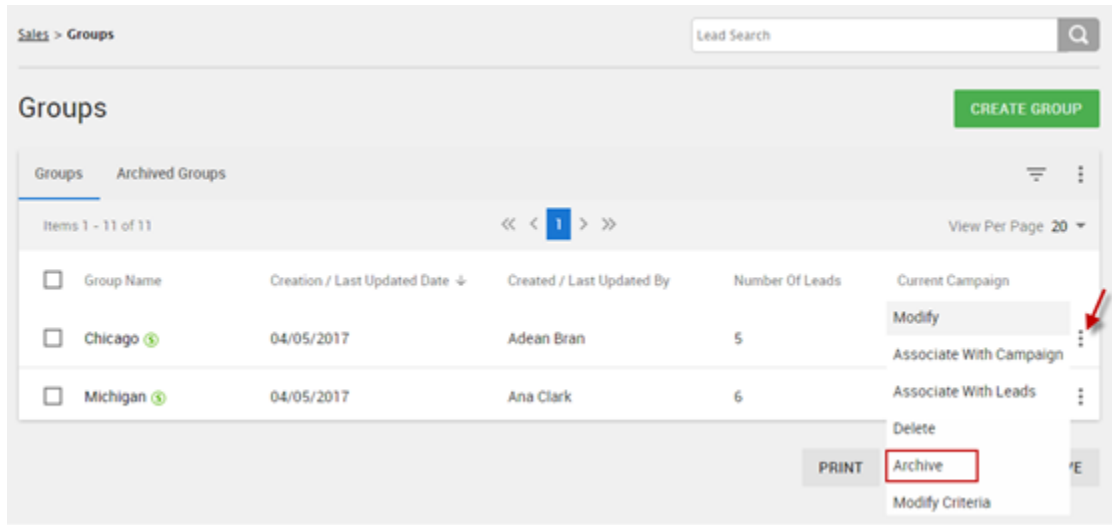
2. Click **OK** to confirm the deletion.



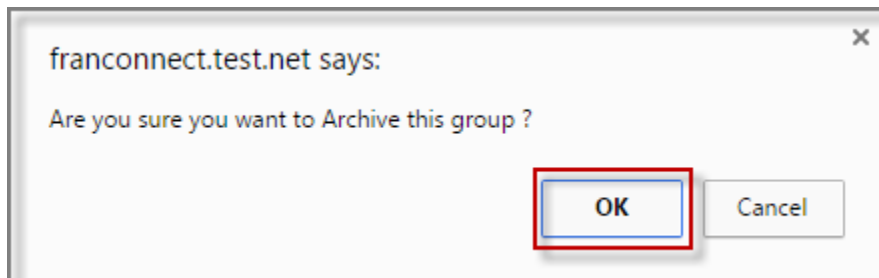
Archiving a Sales Group

You can send a Sales Group to the list of Archived Groups by following the steps mentioned below:

1. Click the more actions icon corresponding to a group name and select **Archive**.

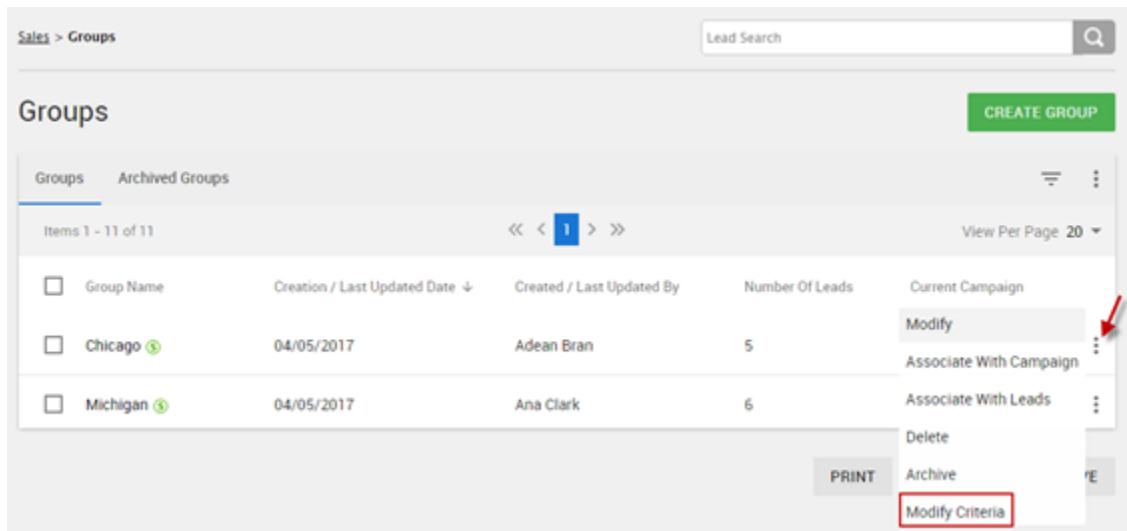


2. Click **Ok** to archive the group.



Modifying the Criteria of a Sales Group

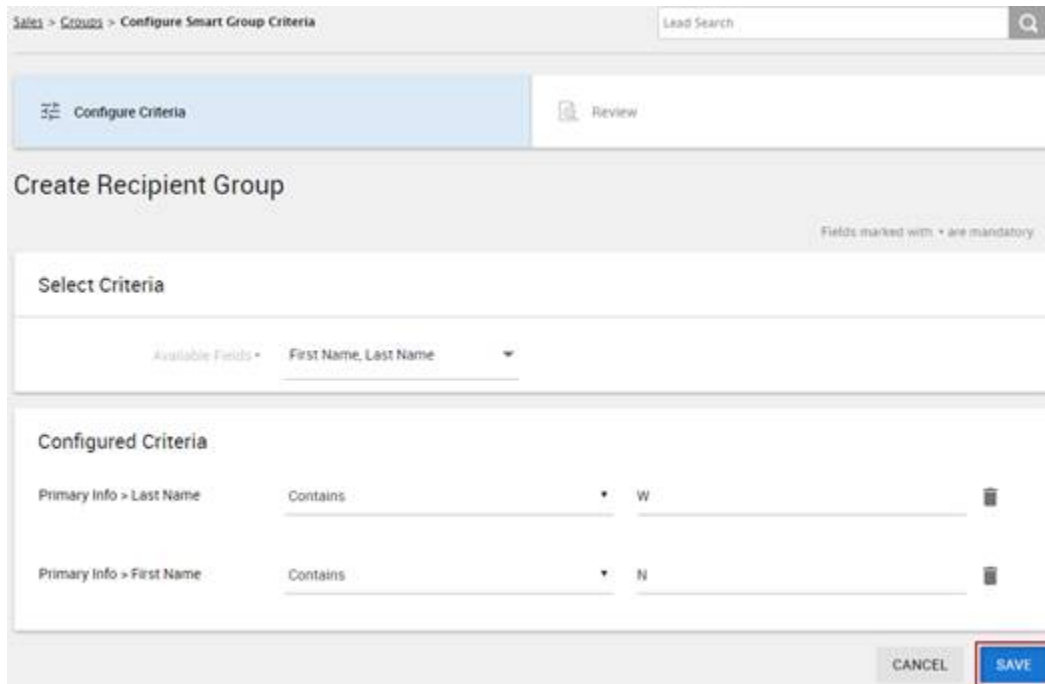
1. Click the action button corresponding to a group name and select Modify Criteria.



The screenshot shows the 'Groups' page with a table of sales groups. The table has columns: Group Name, Creation / Last Updated Date, Created / Last Updated By, Number Of Leads, and Current Campaign. The 'Chicago' group is selected, and the 'Modify Criteria' option is highlighted in the context menu.

Group Name	Creation / Last Updated Date	Created / Last Updated By	Number Of Leads	Current Campaign
Chicago	04/05/2017	Adean Bran	5	
Michigan	04/05/2017	Ana Clark	6	

2. You can configure the **Smart Group Criteria** and click **Save**.



The screenshot shows the 'Configure Smart Group Criteria' page. The 'Create Recipient Group' section shows the 'Select Criteria' and 'Configured Criteria' sections. The 'Save' button is highlighted.

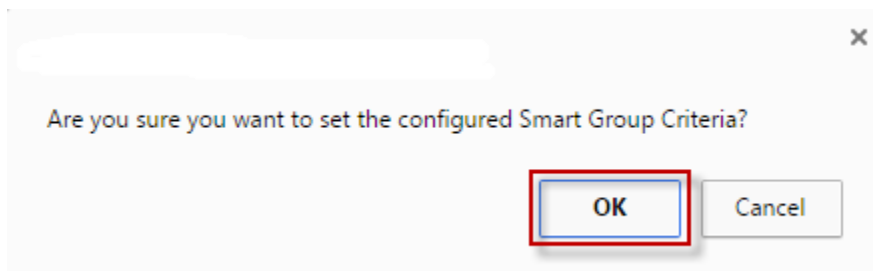
Select Criteria

Available Fields: First Name, Last Name

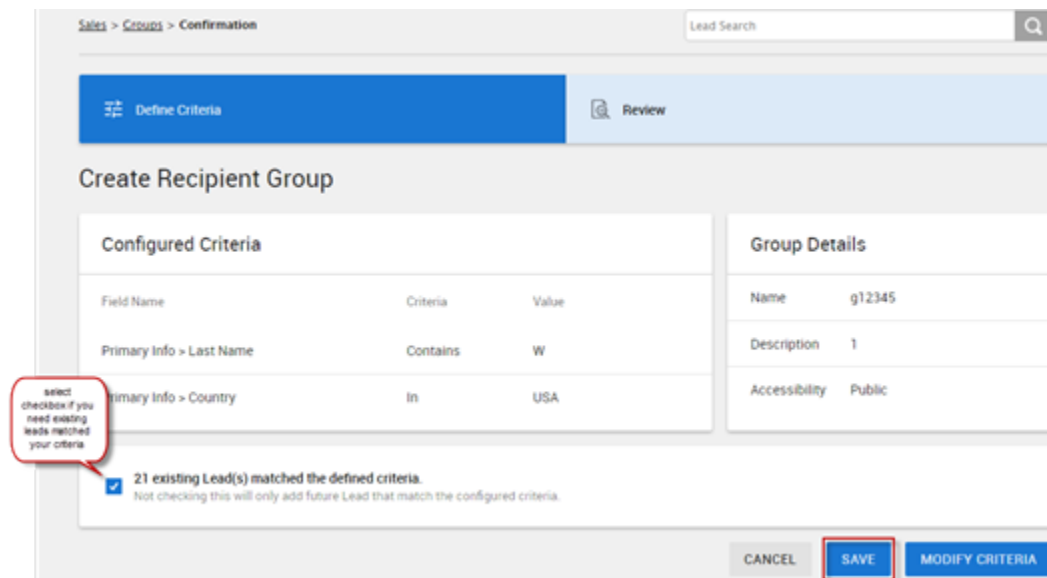
Configured Criteria

Primary Info > Last Name	Contains	W	
Primary Info > First Name	Contains	N	

3. Click **OK** to confirm.



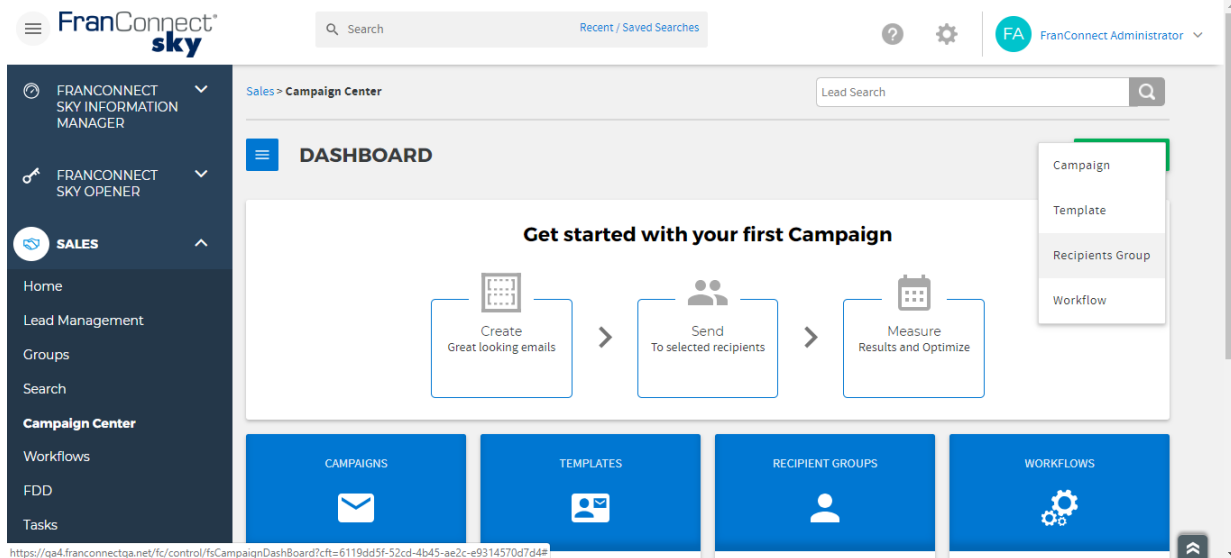
4. Your configured criteria along with the number of leads which match the criteria is shown on the **Confirmation** screen below:



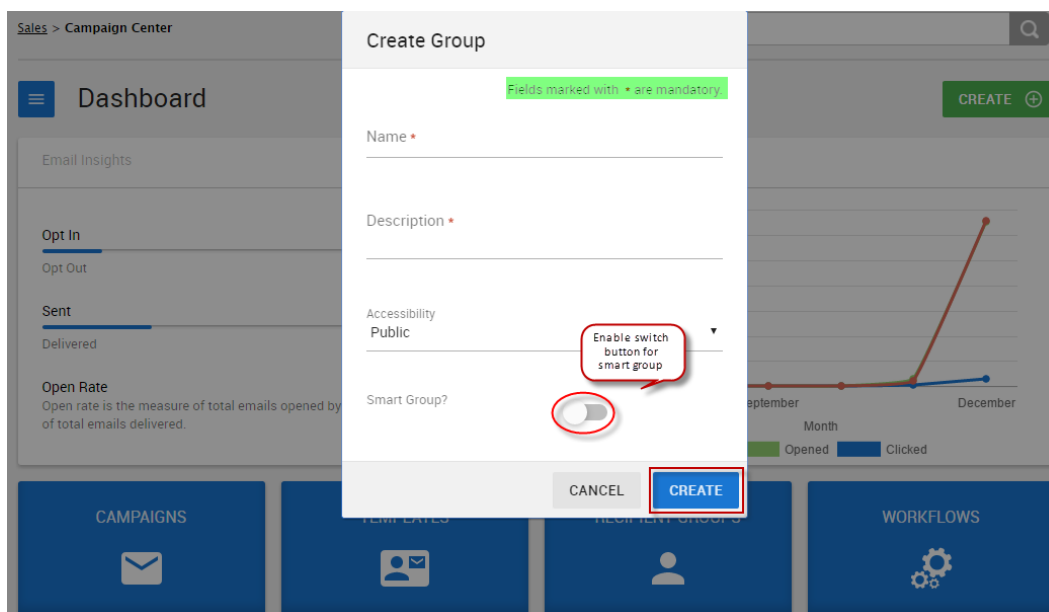
5. Select the checkbox next to the matching leads to move them to the Smart Group and click **Save**.

Creating an Automated Sales Group

FranConnect allows you to create **Smart/Automated Sales Groups** to manage your leads. You can create automated groups from the **Groups** page. You can also use the **Campaign Center** to do this.



1. Input **Name** and **Description** for the group.
2. Choose **Accessibility** from the drop-down. You can choose to keep the group Private or Public.
3. Enable the toggle button for **Smart Group**.



4. Click **Create**.
5. Configure the criteria for the leads to match your Smart group.

Sales > Groups > Configure Smart Group Criteria

Lead Search

Configure Criteria Review

Create Recipient Group

Fields marked with * are mandatory.

Select Criteria

Available Fields * **Select**

Configured Criteria

CANCEL SAVE

Sales > Groups > Configure Smart Group Criteria

Lead Search

Configure Criteria Review

Create Recipient Group

Fields marked with * are mandatory.

Select Criteria

Available Fields * Last Name

Configured Criteria

Primary Info > Last Name

Contains
Equals
Contains
Starts With
Ends With
Does Not Equal
Is Empty
Is Not Empty

Enter value here according to your selection

CANCEL SAVE

6. Click **Save**.

7. Click **OK** to confirm.

franconnect.test.net says:

Are you sure you want to set the configured Smart Group Criteria?

☐ Prevent this page from creating additional dialogs.

OK Cancel

8. Select the checkbox if you want the existing leads matching your criteria to be added to your group. If you decide to keep the checkbox unchecked, all future leads matching your configured criteria will be added to the Smart group.

9. Click **Save**.

Sending a Sales Campaign to a Group

To send a Sales Campaign to a group of recipients, follow the steps mentioned below:

1. Select **Campaign Center** from the **Sales** module.
2. Select **Campaigns** from the Navigation Panel.
3. To send an Email campaign click the corresponding **Send** button.

You can also send an SMS Campaign using the **SMS** Tab.

4. Select the Recipient Group(s) for the Campaign by clicking the corresponding checkbox.

You can also send the campaign to all the recipients by enabling the **Send to all Recipients?** Toggle button.

The screenshot shows the 'Select Recipients' page. At the top, there is a breadcrumb trail: Sales > Campaign Center > Campaigns > Select Recipients. A 'Lead Search' bar is on the right. Below the header, there is a toggle for 'Send to all Recipients?'. A red box highlights this toggle. Below that is a section titled 'Recipient Groups' with a 'FILTER RECIPIENTS' button. A table lists 11 items. A red callout bubble points to the first row, 'SalesLead(S)', with the text 'Select group(s)'. The table has columns: Group Name, Group Type, Creation / Last Updated Date, Created / Last Updated By, Number Of Leads, and Current Campaign.

Group Name	Group Type	Creation / Last Updated Date	Created / Last Updated By	Number Of Leads	Current Campaign
SalesLead(S)	Public	12/02/2016	FranConnect Admini...	7678	
SM Group(S)	Public	11/25/2016	FranConnect Admini...	20018	
Cinnabon Franchise...	Public	06/30/2014	Kimberly Tauch	1	
G1	Public	11/24/2016	FranConnect Admini...	2	
The Mall at Turtle Cr...	Public	11/17/2016	Greg Ganter	0	
IAAPA 2014	Public	11/25/2014	Kimberly Tauch	0	

5. To filter the list of Recipient Groups, click the **Filter Recipients** button.

This screenshot shows the same 'Select Recipients' page, but with the 'FILTER RECIPIENTS' button highlighted by a red box. The 'Send to all Recipients?' toggle is now disabled. The table of recipient groups is still visible.

a. Select the criteria to Filter Recipients from the **Select Fields to Set Criteria** drop-down.

Select Recipients

Send to all Recipients? ☐

Filter Recipients ⓘ

RECIPIENT GROUPS

Select Fields to Set Criteria * Date of FDD

Configured Criteria ⓘ

Compliance > Date of FDD Is Between Start Date End Date

APPLY FILTER

BACK CONTINUE

b. Provide further details of the selected criteria in the **Configured Criteria** field and click **Apply Filter**.

c. Click **Continue**.

6. The following Confirmation screen appears. Click **Confirm** to send the campaign to the selected recipients.

Confirmation

Recipient Details

Total No. of selected leads 1 Leads

Total No. of leads to whom Campaign Email would be sent 1 Leads

Total No. of leads with whom Campaign cannot be associated 0 Leads
(As they have been Opted Out, Opt-In Pending, Opt-In Request not Sent or do not have Email or have email which belongs to bounce/spam list or they are from Unregistered State / Province or already associated with this particular campaign)

Campaign Details

Campaign Name Twf :: Tint World® Awarded 2014 Retailer Of The Year Campaign Date 08/29/2014 01:54 AM

Template Details

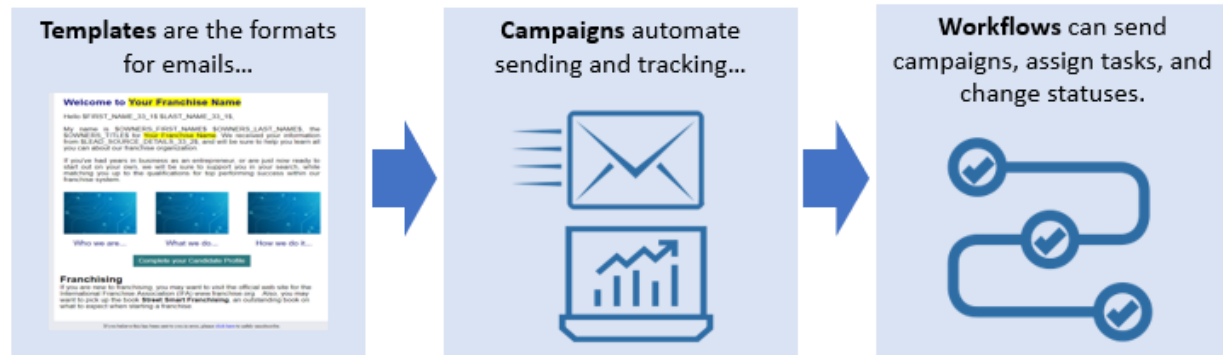
Template Name Created By Last Updated

TWF :: Tint World® Awarded 2014 Retailer of the Year Brian Schroeter 09/07/2016

CANCEL CONFIRM

Setting Up Campaigns for your Groups

Tasks that you do over and over can be automated, using tools in FranConnect. The three tools most frequently used are templates, campaigns, and workflows.



Templates are the foundation for campaigns but can also be used to standardize single emails you send to leads. For example, if every lead receives the same email from you at an undefined time during the sales process, you may create a template without assigning the template to a campaign. In this case the template is available for use whenever appropriate as a standardized email that goes out to the lead. The easiest way to create a template is to edit one that FranConnect has already provided.

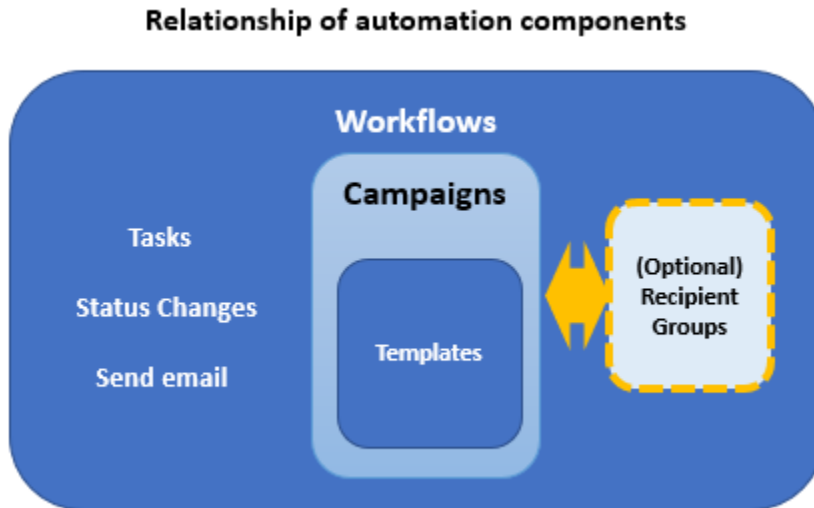
Campaigns are groups of email templates, arranged to be sent in a defined order. They can be used for marketing purposes (“Here is why you should buy our Franchise”, informational purposes (“Here are details about this event”) or to gather lead data (“Filling out the application is the next step in the process, click here to fill out the application”).

To automate the delivery of a campaign you create a **workflow**. Workflows allow you to create system guidelines for when campaigns are sent, tasks are created, and statuses are changed automatically.

Any of these elements can be used independently – you can make an email template that you send without a campaign, or a campaign without using a workflow. Here’s how they fit together.

Campaigns and Workflows

Workflows may contain campaigns, which may in turn contain templates and groups to which the campaign will go.



Both workflows and recipient groups require campaigns to already exist. Campaigns can use pre-existing templates, or you can build the templates inside the campaign-building interface. Two potential orders for building these are:

Templates > Campaigns > (Recipient Groups) > Workflow

OR

Campaigns (building templates inside) > (Recipient Groups) > Workflow

Let's see how each component contributes to the automation process.

About Templates

Templates let you design email communications that show off your brand, and are personalized to the recipients.

You can choose from pre-built layouts and customize with your own artwork, or you can build your own templates from scratch or using HTML code that you already have. For tips on using existing HTML code in FranConnect templates, please see the page

<http://portland.franconnect.net/help/emaildesignguidelines/>

You can customize the content in your emails to include greetings by name, and important information from the recipient's record in FranConnect, such as the expiration date of an insurance policy. To do this, you use keywords – placeholders for the information. For more about keywords, see "About Keywords" in the Step by Step guide for the module you're using – Sales, Information Manager, or CRM.

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*

About Campaigns

Campaigns are typically groups of emails that are sent out to recipients who meet specific criteria. Those criteria could be met individually, like being added to the system or having a status change, or as a group, for example all people whose insurance expires in the same month, or people assigned to a Recipient Group.

Sales module campaigns go out to potential franchisee candidates. CRM module campaigns go to potential leads of your franchisees. When setting up a CRM campaign, you can set up the campaign to apply to ALL locations (a Master Campaign), or assign it to apply to selected franchises.

In addition, you can choose to set up a CRM campaign as a “drip” campaign, which means that you can define multiple emails to be sent at intervals you define, all as part of the same campaign.

Information Manager campaigns go to franchisees.

When should I use campaigns vs. emails in a workflow?

Campaigns can be tracked, which often makes it worth setting up a campaign and a template even when you have only one email to send. A good rule of thumb is to use campaigns for external emails, and embed emails directly into a workflow only for internal emails, such as reminders or information emails to corporate staff.

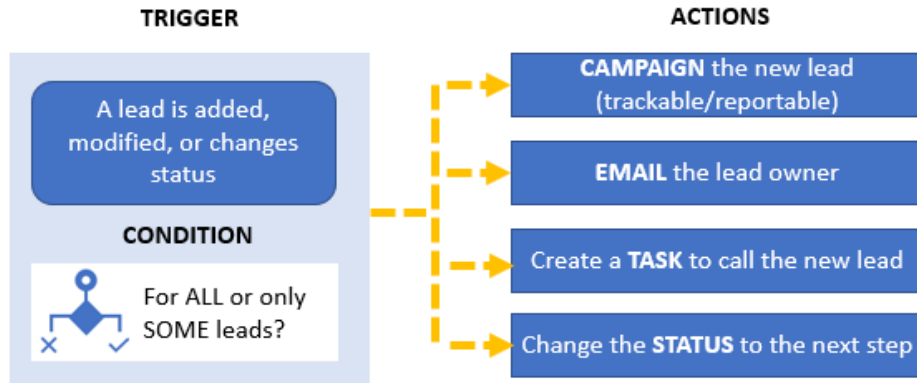
About Recipient Groups

Groups are mailing lists of recipients who match a set of criteria you define based on fields in their profiles. You can build a static group by defining the group once and associating leads, or you can build an automated (Smart) group, which will add new recipients into the group as they enter the system.

Groups can only be associated with one status-based campaign at a time. They can be associated with multiple promotion-based campaigns.

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.

Sales
Record is added/modified
Events: Lead signs FDD Lead fills out a specified web form First activity logged Specified campaign is sent to a lead Call is logged Email sent to lead Lead status changed When specified candidate portal activity is logged

What's the difference between a status-driven campaign and a workflow based on a status change?

In a workflow, the status change is an **event**, meaning that the initiation of that status kicks off the workflow. A campaign will continue to progress as long as the lead stays in that status, and will stop when that lead moves out of the status, even if the status is not complete.

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.

Sales

You can make conditions based on values for one or more fields in the record, including fields that you add.

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.

Sales

Send email campaign

Change status

Send email

Create task

Change candidate portal status

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.

Examples of Campaigns for Leads

For leads who have not yet moved along in the sales cycle, you may wish to set up a series of emails that goes to them for as long as they remain in a certain status (for example, New Lead). A schedule of those emails may look like this:

Day 1 of status: Send an email with a high-level overview of your brand and culture

Day 3 of status: Send a video from VP of FranDev introducing them to the brand

Day 12: Send an email about the support mode for Franchisees

Day 18: Send an email of franchisee testimonials

Day 24: Send an email with a product/service spotlight – how the brand will support marketing your territory to aid in business sales

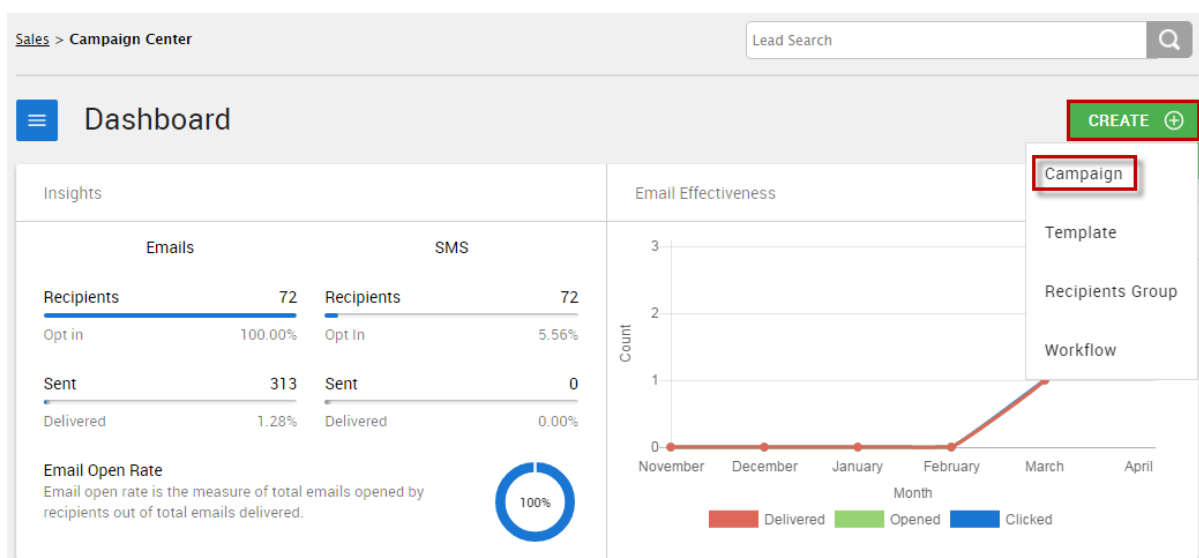
You can set up each of your email templates ahead, and combine them into a “drip” campaign that will steadily feed your prospects information, providing them with multiple touches and a regular cadence of information from you, with a minimum of intervention from your side. This frees you up to concentrate on the personal interactions you’ll have with them in qualifying them and ensuring culture fit for a successful relationship.

Creating a Sales Campaign

You can use various pre-defined templates to communicate with your potential franchisees. These templates can be customized to include name, position, contact, and other details. To create a Sales Campaign:

1. Select **Campaign Center** from the Sales module.

2. Click the **Create +** button and select **Campaign**.



3. Enter the Campaign details, such as Campaign Name, Description, and choose the accessibility between Public and Private. You can also create an SMS Campaign by clicking the **SMS** tab.

Create Campaign

Fields marked with * are mandatory.

Campaign Name *

Description *

Campaign

Email

SMS

Accessibility *

Public

CANCEL

START

4. Click **Start**.

There are three tabs available for you to create and customize Templates:

Choose From Existing: To personalize an existing template.

Code your own: To design a template in a text/html format.

Layout and themes: To create a new template using layouts and themes.

Sales > Campaign Center > Create Template

Lead Search

Templates

Selecting Template Now

Recipients

No Recipients selected yet

Schedule and Launch

Campaign not scheduled yet

Long Island - South(Public)

Campaign to manage all Leads coming from South

Create and Customize Templates

ASSOCIATED TEMPLATES (0)

Layouts and Themes

Code your own

Choose from existing

6. After creating a new template or customizing an existing one, you can associate recipient(s) with the campaign by following the steps mentioned below:

a. **Recipient type:** Select the Recipient Type between **Leads** and **Brokers**.

b. **Filter Recipient:** You can set a criterion to filter the list of recipients by selecting single or multiple options from the **Select Field to Set Criteria** drop-down. Click **Apply Filter**.

c.**Recipient Groups:** A Campaign can be associated with one or more Recipient Groups.

7. Click **Continue**.

8. After associating recipients, you can schedule and launch the campaign. To customize the Delivery & Schedule information, follow the steps mentioned below:

a.**Sender Name:** Select the Sender's name which will appear in the 'From' field of the email campaign. You can choose the Owner's Name or provide a different name from the **Custom** tab.

b.**Reply-to Address:** You can select the email address where responses to your emails will be sent. You can choose the Owner's Email address or provide a different address from the **Custom** tab.

c.**Campaign Start Date:** Set the date from which the campaign will be active in the system.

d.**Campaign Time zone:** Schedule the Email campaign based on the Time Zones of the recipients.

9. If you want to send the first email to the associated recipients as soon as they are added to the campaign, enable the toggle button.

Specify the frequency to send emails by entering a number in the '**Specify days gap between each Email**' field.

You can also set the time at which all emails will be sent to the recipients. Select the appropriate time from the '**At time this**' drop-down.

Click **Launch Campaign**.

Creating a Sales Template

1.Select **Campaign Center** from the **Sales** module.

2.Click the **Create+** button and select **Template**.

3.There are two tabs available for you to Create and Customize email templates, as described below:

•**Layouts and Themes:** You can customize an existing template from this tab.

a Hover on a layout and click **Customize**.

b.Enter the template information including its Name, Subject and the Folder Name.

c.Select the **Accessibility** between Public and Private.

d.Set an Email type for this template by selecting the appropriate option from the drop-down.

e.Click **Done**.

f.To customize the existing template, you can drag and drop the required **Elements and Layouts** to the template on the right.

g.Click **Preview and Test** to preview how your template appears after adding elements to it.

h.You can view how your template will appear on different devices, by selecting the tabs on right.

i.Click **Save**.

•**Code your own:** You can create a new email template from this tab by following the steps mentioned below:

- a)Give a name to the template.
- b)Provide a subject to the email.
- c)Choose the accessibility between **Public** and **Private**.
- d)You can design an email in a Graphical format, Plain Text or upload an HTML/ZIP file.
- e)Enter the email body and upload attachments, if any.
- f)Click **Save** to save the Sales Template.

Changing a Sales Template

- 1.Select **Campaign Center** from the **Sales** module.
- 2.Select **Templates** from the Navigation Panel.
- 3.Click the more actions icon corresponding to the email template you want to change.
- 4.Select **Modify**.
- 5.You can customize the sales template and change the existing details including the Template Name, Title, Email Subject, and Accessibility from the **Modify and Customize Templates** screen, as shown below:
- 6.Click **Save** to save the changes.

Using SMS to Market to Leads

For sending and receiving SMS you need to setup a Twilio account. Twilio is a cloud communications platform for building Voice & Messaging applications on an API. Put simply, it provides you the phone numbers to send and receive SMS and calls.

Twilio provides only an API and not the interface for phone numbers. Integration of Twilio with FranConnect Sky allows you to send and receive SMS in the FranConnect system.

To Configure SMS Accounts, follow the steps mentioned below:

Applying Filters

You can use filters to narrow your search for SMS campaigns. You can apply filters based on Campaign Name, Creation Date, Sort By, Created By, User, Status, and Accessibility.

Input your filter criteria, and click **Apply Filters**.

1. Select **Admin** from the Admin Panel.
2. Click **Configuration** from the Navigation Panel.
3. Click **Configure SMS**.
4. Click the **Configure SMS Settings** tab.
5. Click the **Yes** radio button to enable SMS and provide values for the **Account ID** and **Authentication Token**.
6. Click **Save**.

Note: You can further configure these settings from the **Configure SMS Account(s)** tab and by selecting **Configure Account** from the action wheel.

The Configure Account screen appears, Make the required changes and click **Save**.

7. Sign up on Twilio by going to <https://www.twilio.com>.
8. Enter your information and click Get Started to create your Twilio account.
Note: From the following Twilio console dashboard, copy and paste the **Account Sid** and **Auth Token** values in the corresponding fields on the **Configure Account screen** (shown above).
9. Navigate to Admin > Configuration > Configure SMS
10. Click the Action wheel corresponding to an **SMS Account Name** and select **Get Numbers**.
11. To import numbers from Twilio, click the corresponding checkbox and click **Import**.
12. To purchase local numbers, click the **Purchase Number** button.
13. Select the required numbers from the list of available numbers and click **Purchase**.
14. A confirmation screen appears displaying the purchased numbers. Click **Close**.
You will now be able to send SMS to Leads from the purchased numbers.

Creating SMS Campaigns

You can create targeted SMS/MMS messages to reach out to your leads and customers on the go. To create an SMS Campaign:

1. Select **Campaign Center** from the Sales Module.
2. Click the **Create+** button and select **Campaign**.
3. The following **Create Campaign** screen appears. Click the **SMS Campaign** tab.
4. Enter the SMS Campaign name and provide a description for the same.
5. Choose the **Accessibility** between Public and Private and then click **Start**.
6. The following **Select and Customize Templates** screen appears from which you can send personalized messages to your audience. You can create your own SMS Template or choose from existing ones by selecting the required tab.
7. Provide a Name and Description for the SMS Template.

8. Enter the message text in the space provided.
9. You can associate an image with the SMS by clicking **Upload Image**.
10. Click **Save & Continue**.
11. Select the Recipient(s) for your SMS Campaign by clicking the corresponding checkbox. You can send the campaign to all the Recipients in the FranConnect System by enabling the **Send to All Recipients?** toggle button.
12. The following **Finalize & launch Campaign** screen appears. You can set the campaign duration as well as the time zones of the recipients from here.
13. Enable the toggle button to send the first SMS as soon the campaign is associated with recipients.
14. Verify the Recipient details and click **Finalize and Launch Campaign**.

Using Keywords in Templates

Keywords are place-holders for specific details which you include in communications, such as contact information and other details of the leads. When a message is sent, the actual information replaces the placeholder, like 'Mail Merge' in a word processing system.

To insert keywords in a template, follow the steps mentioned below:

1. Select **Campaign Center** from the **Sales** module.
2. Select **Templates** from the Navigation Panel.
3. Click the more actions icon corresponding to an email template and select **Modify**.
4. Click the **Insert Keywords** icon on the **Modify and Customize Templates** screen.
5. Select the keyword you want to enter from the **Available Keywords** drop-down.
6. Copy the keyword from the **Copy Keyword's Value** field and paste it in the body of the template.
7. Complete any additional edits.
8. Click **Save**.

Creating Template Folders

It may help to organize templates to store them in folders. To create folders:

1. Select **Campaign Center** from the **Sales** Module.
2. Click the icon on the Dashboard to view the Navigation Panel.
3. Select **Templates** from the list.
4. Click the **Template Folders** tab.

5. Click **Create Template Folder**.

6. Provide a name and description for the template folder.

7. Click **Save**. You can add templates to this folder whenever required.

However, if you wish to add a Template at the time of creating a Template Folder, click **Save and Add Template**.

Automating Campaigns

You can automate the process of sending campaigns by creating Workflows.

You can configure the criteria to send campaigns emails whenever a lead is added/modified and meets your predetermined criteria.

There are two ways to create workflows:

- Select the **Campaign Center** from the **Sales** module and then select **Workflows** from the Navigation Panel.

- Select **Workflows**.

1. Click the **Create Workflow** button.

2. Provide a **Name** to the workflow and choose the workflow type between **Standard** and **Event Based**.

3. Click **Next**

4. Select a Trigger to execute the workflow and click **Next**.

5. Set a Condition by selecting the leads for executing this workflow.

If you wish to execute this workflow on leads which fulfil a criterion then, click the **Leads matching below condition(s)** radio button and select the fields to filter leads from the drop-down.

6. Click **Next**.

7. Click the **Choose Action** button and select **Send Campaign** from the list of actions.

8. A **Send Campaign** screen appears. Select the Campaign to be associated with this workflow from the **Action** drop-down.

9. Click **Associate & Save**.

10. Click the **Create** button to create this workflow.

Creating Automated Tasks

To create an automated task, follow the steps 1 to 6 of Automating Campaigns and then, perform the steps mentioned below:

1. Click the **Choose Action +** button and select **Create Task** from the list.

2. Enter the task details as described below:

a. **Assign To:** You can assign the task to the lead owner or any other user from the **Lead Owner** and **Custom** tabs.

b. **Subject:** Enter a subject for the task.

c. **Task Description:** Provide a brief description of the task.

d. **Priority:** Set a priority for the task by choosing Low, Medium and High.

e. **Task Type:** Select the appropriate task type from the drop-down.

f. **Schedule Task Start Time:** You can schedule the task for the same day or any upcoming day from the **Immediate** and **after** tabs respectively.

If you do not want to associate time with the task, click the **Timeless Task** checkbox.

g. **Set Reminder:** You can set a reminder so that the users who are assigned the task, get an intimation 15 minutes prior to the scheduled time.

3. Click **Create**.

4. Click the **Create** button to create an automated task.

Identifying Leads with No Activity

You can run a report that shows you the leads who have not been contacted in a selected period.

The screenshot displays the 'SALES' application interface. On the left, a sidebar menu lists various options: Home, Lead Management, Groups, Search, Campaign Center, Workflows, FDD, Tasks, Calendar, Import, Export, Mail Merge, Sites, Brokers, **Reports** (highlighted with a red box), and Dashboard. A red dashed arrow points from the 'Reports' menu item to the 'REPORT LIST' section in the main content area. The 'REPORT LIST' section contains a list of report categories: Lead Count Reports, Lead Status based Reports, Lead Owner based Reports, Lead to Franchise Conversion Reports, Lead Source Reports, **Activity Reports** (highlighted with a red box), Candidate Portal Reports, Killed Lead Reports, Campaign Reports, SMS Reports, FDD Reports, and Custom Reports. A second red dashed arrow points from the 'Activity Reports' category to the 'Activity Reports' section on the right. This section lists several reports: Lead Heat Index Report, Discovery Day Visit Report, Email Status Report, **Track Inactive(without any activity) Leads Report** (highlighted with a red box), Call Activity Report, Lead Contacted Details Report, Website Activity Report, Email Subscription Report, and Lead Count Reports. The description for the highlighted report states: 'This report displays the leads without any activity (Call, task, etc) for specified period.'

You can filter this report by owner, source, status, type of activity and period of time not contacted. The list itself is presented in Lead Owner order, and you can click through any number presented in blue to see the details of the uncontacted leads.

View Leads Belonging To	Source	Status Category	Activity	Brand	Inquiry Date	Activity Date
All Selected	All Selected	Active Leads	All Selected	Select	Last 3 Months	All
View Report	Save View	<input type="checkbox"/> Show Rows With Zero Records	<input type="checkbox"/> Exclude Co-Applicant Records			

TRACK INACTIVE (WITHOUT ANY ACTIVITY) LEADS REPORT (03/21/2021 - 06/21/2021)(ALL)
This report displays the leads without any activity (Call, task, etc) for specified period.

Lead Owner	New Leads	Total Active Leads	No Activity	No Call	No Email	No Campaign Email	No Mail Merge	No Microsoft Outlook Mail	No Task	No Status Change
Total	0	647	0	0	0	0	0	0	0	0
Alice Bronovski	0	11	0	0	0	0	0	0	0	0
Area Manager CST	0	1	0	0	0	0	0	0	0	0
Bart V	0	7	0	0	0	0	0	0	0	0
Brad Brand	0	2	0	0	0	0	0	0	0	0

This report can be exported to Excel or printed for a summary of leads needing action. When you drill down into a number, you'll see lead details that can provide an action list for the owner.

Sales > Lead Summary [Add Lead](#) | [Show Filters](#) |

LEAD SUMMARY [Actions](#) Items 1 - 3 of 3 View Per Page: 20

<input type="checkbox"/> Prospect's Name	Inquiry Date	Status	Lead Owner	Source Details	Cash Available	Investment Timeframe	Emails Read	City / State	Last Contacted	Heat Index	County	Action
<input type="checkbox"/> Wyatt James	10/16/2020 03:43 PM	New Lead	Alice Bronovski	Franchise			0	-- / --	10/28/2020	0		Settings
<input type="checkbox"/> Vikram Raj	11/09/2020 07:17 AM	New Lead	Alice Bronovski	Franchise			0	-- / --	Not Contacted	0		Settings
<input type="checkbox"/> Charles Charlie	11/23/2020 07:45 AM	New Lead	Alice Bronovski	Friends			0	-- / Alaska	Not Contacted	0	Aleutians West Census Area	Settings

[Change Status](#)
[Change Owner](#)
[Send Email](#)
[Add To Group](#)
[Associate with Campaign](#)
[Mail Merge](#)
[Merge Leads](#)
[Archive Leads](#)
[Print](#)
[Export As Excel](#)