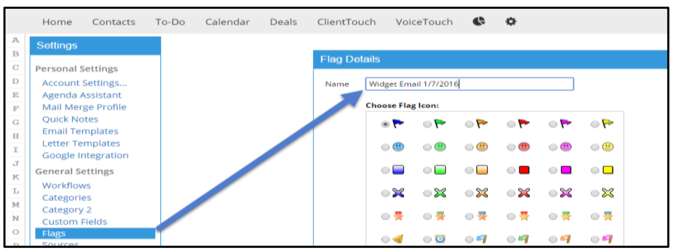
Data Super Center Campaign Set Up Checklist

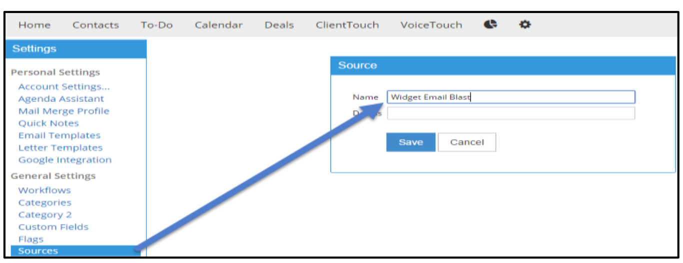
If you take the time to use this checklist when setting up a campaign in the Data Super Center you will experience first-hand the power and efficiency of this tool. If you are like many people and just try to "wing it" instead of following instructions . . . Yeah, let's not do that!

Check off each area below as it is completed

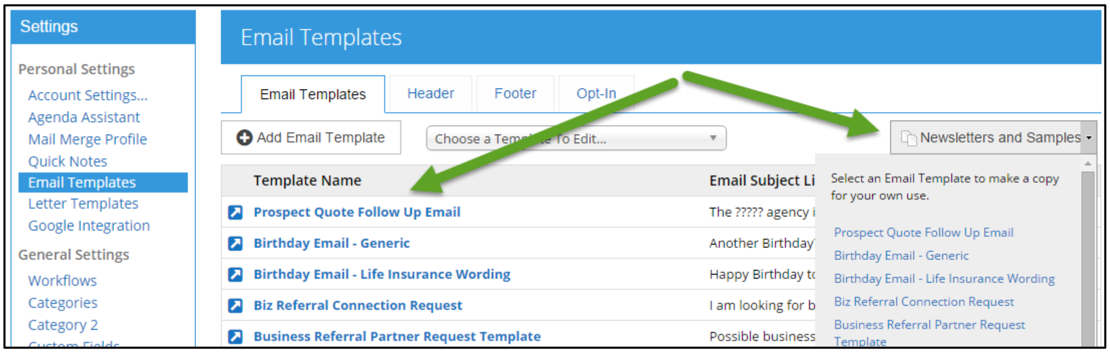
_____ **Flags** – Under the Settings tab create or verify a flag exist for the type of marketing campaign you will set up.



______ **Sources** – Under the Settings tab, create or verify that the source field exist. (Where your prospects are coming from and sources help you identify if your marketing campaigns are working)

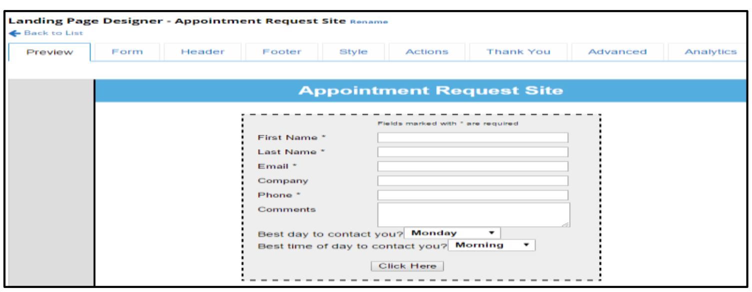


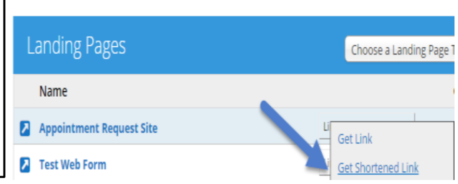
______ **Email Templates** – Go to the Email Templates tab and create or verify the email template you want to use for the marketing campaign. (Check the Newsletter and Samples tab to load Inspire a Nation provided email templates into your system) It is extremely important that you verify the merge field placement. You will come back and paste your landing page links after you create your landing page.



Email templates are generally the foundation of any good marketing and follow up contact campaign. Spend some time making sure your email templates are right for your business and contacts.

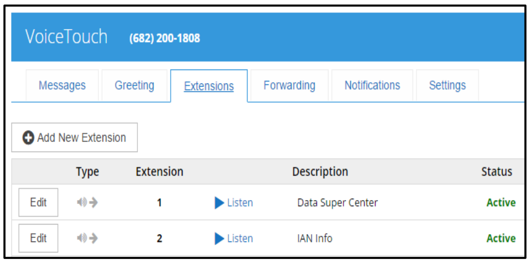
______ **Landing Page** – Used to collect contact information, and trigger automated actions and record creation. Once the landing page and Thank You section are complete, copy the shortened link from the "Links and HTML" tab from the Landing Page main screen. Copy the link to a word document as you will need to paste it into your selected email template. Do not add actions at this point, you will do that later.





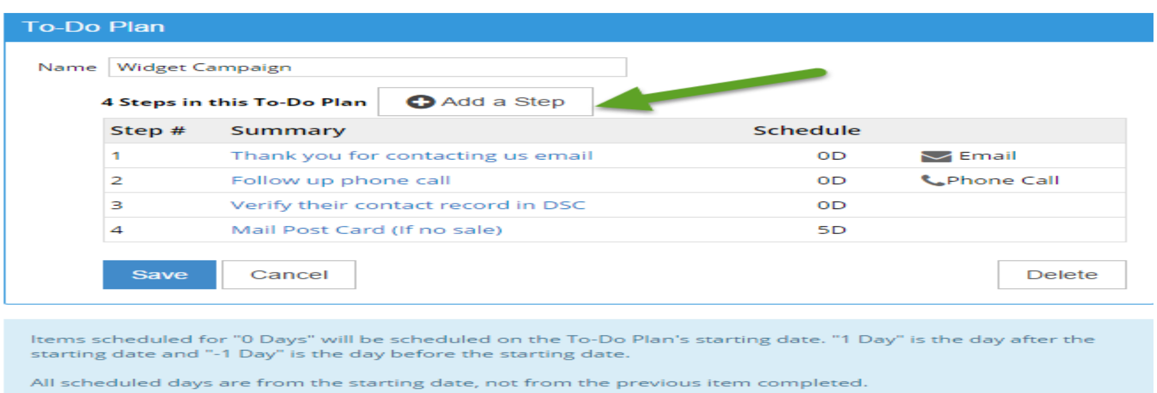
Landing pages should be a primary tool in your business. Don't avoid or ignore them. We have provided some landing pages you can easily modify for your business.

______ **VoiceTouch Phone Number & Extensions** – Record the main greeting of VoiceTouch and make you're your message directs callers to the various extensions for each campaign. Your VoiceTouch phone number allows you to track your incoming marketing calls, allows you to easily direct the contact to the correct marketing message and extension, provides 2-way text message capabilities, and automatically builds or updates contact records. ***(Replace the number in the Mail Merge Profile with your VoiceTouch Phone # after you turn it on)***

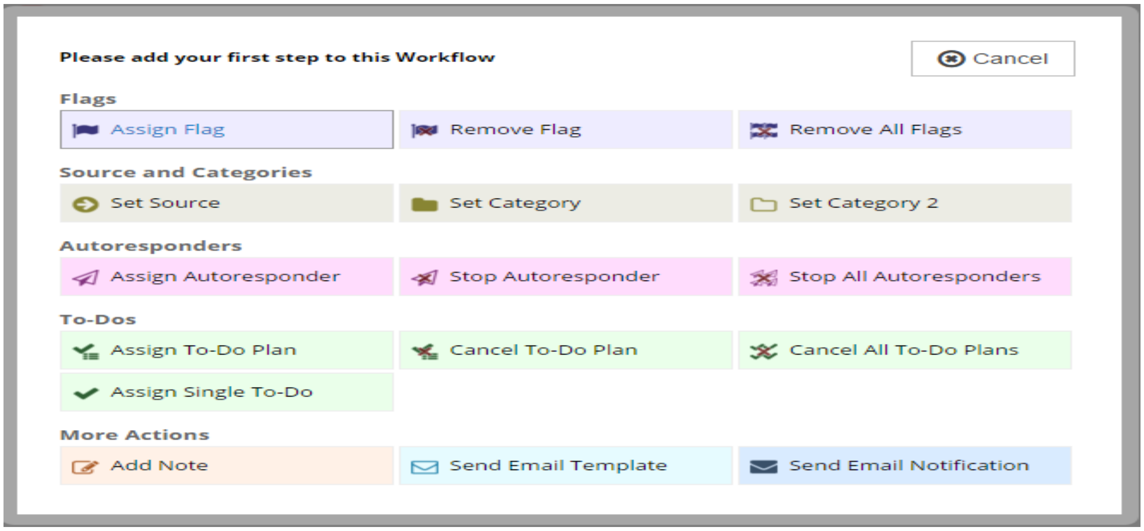


Now that all of the Marketing Automation pieces are in place, your next steps will involve creating To-Do Plans and WorkFlows. These are the directions that tell the system what and when to do something.

______ **Create a To-Do Plan:** Now that you have your VoiceTouch extension, your main greeting updated, your text message turned on, your landing page active with links to it on your modified email template; you are ready to decide what series of task you need to happen to maximize the campaign. Usually a good To-Do Plan has a series of emails, phone calls, possibly postal letters, and follow up actions. *If you are an Active Inspire a Nation Business Mentoring member, use the link at the bottom of the Data Super Center to go to the Video and Document Library and use our suggested WorkFlows on each process to set up the best action, tasks, and intervals for your campaigns and processes.*

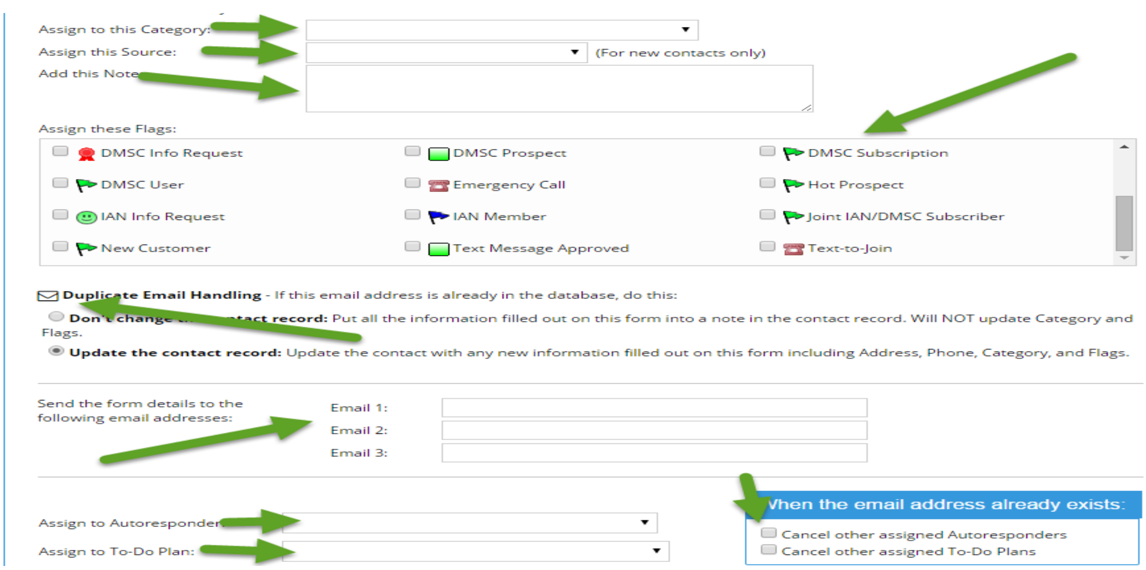


WorkFlow – A To-Do Plan with the additional features of instantly updating a contacts record and starting or stopping other automated actions such as other To-Do Plans or WorkFlows. Certain functions within the Data Super Center can only be triggered using a WorkFlow or To-Do Plan. **Generally you will create a WorkFlow and make the To-Do Plan a part of the WorkFlow plan.**



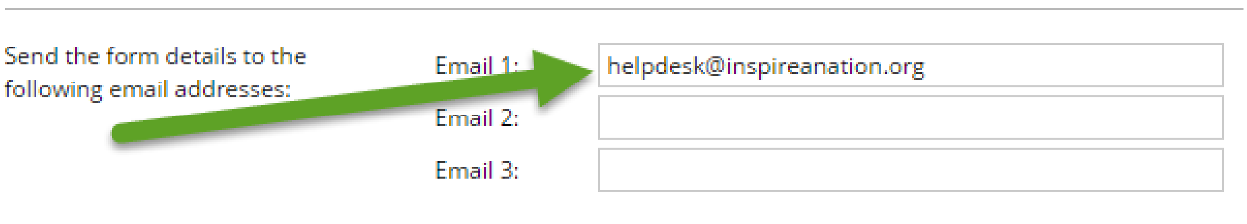
_____ Autoresponder (Drip Email) is another automated piece that you can use in the Data Super Center. Use the To-Do for 4 or less email sends per contacts. Use Autoresponders for 5 or more email sends.

________ **Turn on the automated activities of each major Piece part of the Data Super Center. This is where the magic really happens. Each time a contact responds to one of the marketing parts of the system (Landing Page, VoiceTouch, VoiceTouch Extension, or Text Message, a series of activities, updates, and notifications can occur. You decide what tasks and activities are best for the campaign.**

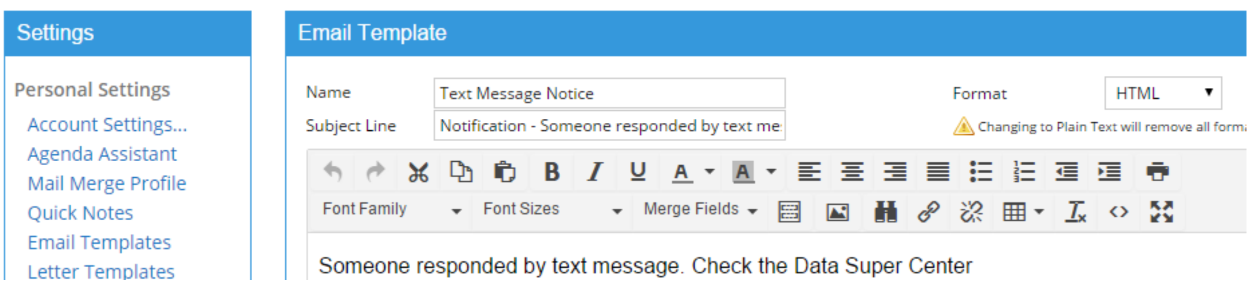


Explore each tab and you will see there is a lot of functionality available to you!

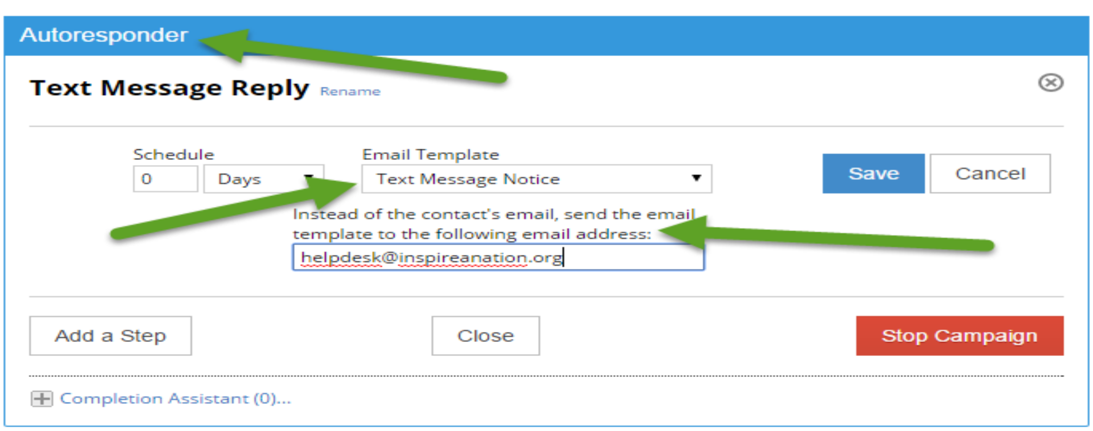
Note: In order to get a notification email each time a contact triggers automation in the system, add sending an email to yourself as part of the workflow or To-Do Plan.



Text Message notice requires that you create an email template and a one task *Autoresponder* that sends an email to yourself

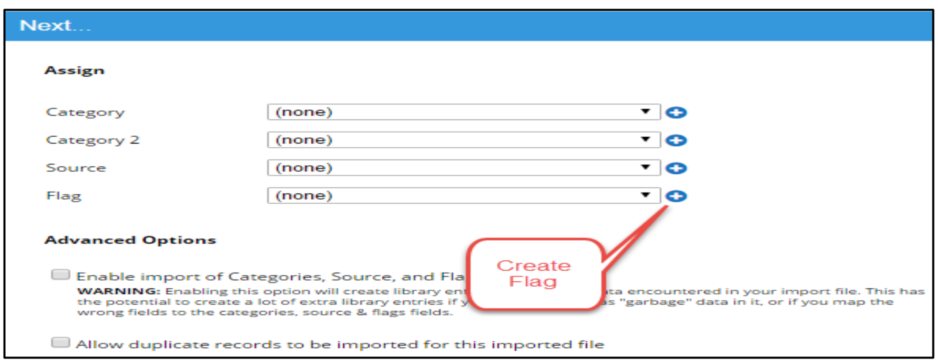


Use the ADVANCED link when adding a task to an Autoresonder to send an email to yourself



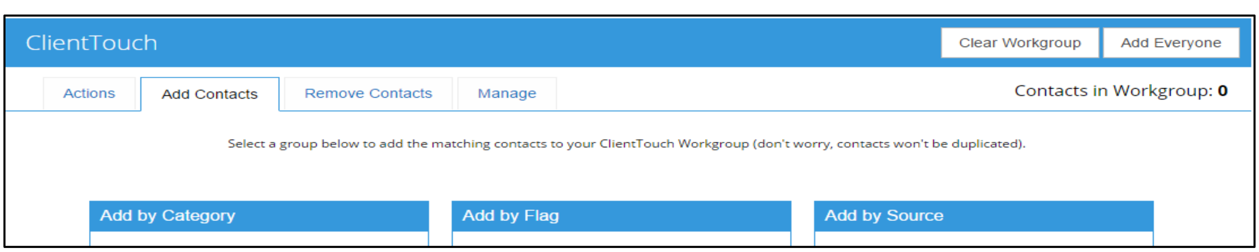
Set the Text Message setting to the Text Message Autoresponder

_____ **Import the Contacts you want to Market**. You will quickly see the importance of using flags to identify contacts. If you are trying to import contacts and you have not created the appropriate Flag, Source or Category, you can do it right from the Import screen. ***I can't stress the importance of adding one or more of these identifiers when importing a list!***



The ONLY required fields to import a contact into the system are First Name, Last Name, Email Address, and Phone Number. (Please watch the video module on importing contacts BEFORE importing contacts)

_____ **ClientTouch** – You must Opt-In your newly imported contacts. Add contacts to a Workgroup by selecting the appropriate Flag, Source, or Category. Under the Actions Tab select Email Opt-In Wizard and opt-in your newly imported contacts.



Functionality available to you once you have added contacts to a WorkGroup by Flags, Sources, or Category.

______ **Review** your Email Templates, Landing Pages, VoiceTouch Greetings and Extensions, and Text-to-Join settings to confirm that all of the automated settings are correct. The system's automated functionality is POWERFUL and you want to get it right so that it makes your workday easier and not filled cleaning up set up errors.

READ THIS BEFORE SENDING OUT YOUR FIRST EMAIL BLAST! **If you have an OPT-IN email addresses for your contacts (such as current customers, internet leads, former customers, or opt-in email addresses), use the Client Touch functionality to add your imported contacts into a Workgroup and opt them all in to receive emails through the Data Super Center by using the "Email Opt-In Wizard, and send out your email blast.**

If you purchased a list of email addresses, you *CAN NOT* send emails to that list through the Data Super Center! To do so could ruin our white label status and damage our ability to deliver emails for ALL Data Super Center Users. If we receive a blatant spam report on your business we WILL cancel your account without notice or refund!

Q. I have a purchased email list, what do I do?

A. Email the list with the link to the landing page you created earlier and your VoiceTouch marketing phone # through a 3rd party vendor such as Direct Aim Marketing (They specialize in emailing purchased email lists - http://www.directaimmedia.com/third-party-email-marketing.html, or a free MailChimp account that allows you to send up to 2K emails. Some people will opt-in by completing the landing page form, some people will text message into VoiceTouch, some people will reply to the email, and some people will mark your email as spam.

After a few months of doing this process you will have a good sized, clean list of email addresses in the system.

If you take the time to use this checklist when setting up a campaign in the Data Super Center you will experience first-hand the power and efficiency of this tool. If you are like many people and just try to "wing it" instead of following instructions . . . Yeah, let's not do that!

Dr. Billy R. Williams - President – Inspire a Nation Business Mentoring