

Marketing Campaigns Process

This document is designed to help you manage the campaign process. At each phase are a number of items that must be checked off or completed before moving to the next phase. This document maps out the progression of a campaign from start to finish.

1. **Set Up**
 - a. People
 - i. All senders have user accounts
 - ii. Expert has user account
 - iii. Senders have been assembled into a Brainshark group
 - b. Content
 - i. Wrap slides developed for all senders
 1. Individual
 2. Bulk create
 - c. Campaigns
 - i. Manage Settings
 1. Wrap slides
 2. Email Templates
 3. Campaign Dictionary
2. **Start Campaign**
 - a. Name Campaign
 - b. Set Customization
 - i. First Slide (image and/or audio)
 - ii. Last Slide (image and/or audio)
 - iii. Any 2 slides (image and/or audio)
 - c. Set Reporting
 - i. Senders (nightly and/or weekly)
 - ii. Campaign Manager (nightly and/or weekly)
 - iii. Any Manager (nightly and/or weekly)
3. **Presentation**
 - a. Compliance
 - i. The customer's usual process of approval
 1. Slides
 2. Script
 - b. Create
 - i. Upload (OR)
 - ii. Use an existing presentation
4. **Audio**
 - a. Invite Core Presenter (Expert)
 - b. Invite Senders
 - i. Prepare with Brainshark tutorial or training.
 - c. Manage Audio Requests
 - i. Preview
 - ii. Re-request
 - d. Mark Complete
 - e. Merge Campaign
5. **Distribution**
 - a. Individual
 - b. Central
 - i. Master list of recipients (.csv format)
 - ii. Identify sender email column
 - iii. Identify tracking code column
 - iv. Send via in house mail tool or Brainshark 3rd party
6. **Campaign Analysis**
 - a. Reporting
 - i. On demand in addition to scheduled
 - b. Reminder Campaign
 - i. For everyone who has not yet viewed the campaign
 - c. Follow Up Campaign
 - i. For everyone who did view the campaign
 - d. Campaign analytics
 - i. Views
 - ii. % viewed (of recipients)
 - iii. % viewed majority of presentation
 - iv. Territory analysis
 - v. Sender analysis
 - vi. Any other pertinent metrics