Marketing Campaigns

The software has the ability to create and track your business's marketing campaigns. The software is able to help you start three different types of marketing campaigns: E-mail campaigns, text messaging campaigns, and postal mail campaigns. If you start a campaign through another medium, such as newspaper or television, you can also use the analysis tools in the software to track this campaign.

Adding a Marketing Campaign

To add a new marketing campaign to the software, follow the steps below:

1. From the **Marketing** pull-down menu, select **Edit Marketing Campaigns**.
2. Click **Add Campaign**.
3. Enter the campaign's name in the **Name** field.
4. Set the **Campaign Status** to **Active**.
5. Optionally enter a comment into the **Description** field, and add the **Start Date** and **End Date** of the campaign.
6. To assist with tracking your campaign's success, set or create a **Ticket Referral** that will be associated with this campaign. Later, when a client comes in because of this specific campaign, you will set that ticket's **Referral** field to match this campaign's **Ticket Referral**.
7. To select which medium you will use, click **Manage Marketing Material** and choose one of the following types of media:
   - **E-mail**, to send the clientele an e-mail directly through Salon Iris. With this option selected, you must specify a template to use. For more complete instructions on using these templates, see the **E-mail Templates** section of this user's guide.
   - **Text Message**, to send the clientele a text message to the SMS addresses on their accounts. With this option selected, you must specify a template to use. For more complete instructions on using these templates, see the **E-mail Templates** section of this user's guide.
   - **Postal Mail**, to send the clientele a letter through postal mail. With this option selected, you can optionally link a file to record what the client is being sent. When this type of campaign is initiated, Salon Iris will print off mailing labels that you can apply to envelopes to send to your clients.
   - **Other**, to record a marketing campaign being initiated through some other form of media. Select the type of media and optionally link a file to this marketing campaign.
8. Click on **Manage Campaign Clientele** and click the **Marketing Campaign Wizard** button to select the clients that will be included in this campaign. For more details regarding the wizard, see the **Mailing Report** section of this user's guide.
9. Click **OK** on the **Manage Marketing Campaign Clientele** screen to save the clients.
10. If you wish to associate coupons with this marketing campaign, click **Manage Coupons**, and then click **Select Coupon** to add the coupons to this marketing campaign. Once all of the desired coupons are added, press **OK**.
11. If you are ready to initiate the campaign, click the appropriate button in the **Initiate Marketing Campaign** section. Depending on the media type for this campaign, the software will take one of the following actions:
    - If your media type is **E-mail**, the clientele will be e-mailed based on your e-mail template.

- If your media type is **Text Message**, the clientele will be sent a text message based on the SMS message template.
- If your media type is **Postal Mail**, Salon Iris will walk you through printing the mailing labels for the clientele. You will be prompted to enter the settings for the labels, including the type of label that you are using. Once these settings are correct, press **Finish** to print the labels.
- If your media type is **Other**, the software will simply mark the campaign as initiated and take no further action.

12. If you are not yet ready to initiate the campaign, click **Save** and you can come back later by editing the campaign to initiate it.

Editing a Marketing Campaign

To edit a marketing campaign, follow the steps below:

1. From the **Marketing** pull-down menu, select **Edit Marketing Campaigns**.
2. Select the campaign you would like to edit and press the **Edit Campaign** button.
3. Make the adjustments to the campaign as necessary.
4. Click **Save** to save the changes.

Cloning a Marketing Campaign

There may be times where you want to create a campaign very similar to an existing campaign. The software helps you with this by providing the ability to copy this campaign using the **Clone Campaign** option in the software. To use this option, follow these steps:

1. From the **Marketing** pull-down menu, select **Edit Marketing Campaigns**.
2. Select the campaign you would like to clone, and press **Clone Campaign** in the **General Options** section.
3. In the prompt that appears, select **Yes** and a new campaign will be created based on the original.
4. You will be asked if you would like to view the campaign. Use the **Yes** or **No** button depending on whether you would like to do this at this time.

Viewing the Campaign Analysis

Salon Iris provides analysis tools to help you learn how well your campaigns are attracting customers to your business. In order for these tools you work, you must use the **Ticket Referral** option on the marketing campaign. The software counts a client as being referred by the marketing campaign if all of the following criteria is met:

- The client was on a ticket closed after the campaign was initiated and the ticket's **Referral Type** matches the **Referral Type** of the marketing campaign.
- The client was one of targeted clientele for the campaign.

To view the analysis of a marketing campaign, follow these steps:

1. From the **Marketing** pull-down menu, select **Edit Marketing Campaigns**.
2. Select the campaign you would like to analyze and press **Campaign Analysis**.
3. The analysis will appear and provide the follow statistics:

- The number of tickets associated with this campaign
- The total amount of income brought in from these tickets
- The average ticket total of these tickets
- The percentage of the targeted clientele that came in because of this campaign

4. Once you have finished looking over the report, press **OK**.