

How To... Run A Mail Shot

Overview

The Key incorporates functionality to run a mail shot to clients either in the form of a traditional printed letter or as a 'bulk' email. Within this document the term 'mail shot' is used regardless of the actual material to be sent to the client. This mail shot can either be for client management purposes (e.g. contacting multiple cases in relation to upcoming reviews), or for marketing purposes. All marketing materials are stored against the individual client records for audit purposes.

There are three elements to the mail shot functionality: identifying/creating the material to be sent, selecting the target clients, and running the actual mail shot.

Mail Shot Material

Whether a printed document or an email, the format of the marketing material remains the same; namely a template within the Setup > Letters area of the Key. For an email mail shot, the content of the template will appear within the body of the email; this should be taken into consideration when creating the template.

Each document that is to be made available within the mail shot functionality should be noted as a marketing documents within the document settings, again accessed via Setup > Letters.

Letter templates										
Description	Type	Created Date	Last Modified Date	Last Modified By	Expiry Date	Branch / Team	Category	Doc Generation	Marketing	
FFMortTemplate002	Word file	01/07/2012	14/04/2014 10:23	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FFMortTemplate002	Word file	17/07/2012 11:27	14/04/2014 10:23	Paul Chambers	(none)	All	Fact Find	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FFMortTemplate003	Word file	21/01/2014 12:14	14/04/2014 10:23	Paul Chambers	(none)	All	Fact Find	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FFSLGITemplate002	Word file	01/07/2012	14/04/2014 10:23	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FFSLGITemplate002	Word file	17/07/2012 11:27	14/04/2014 10:23	Paul Chambers	(none)	All	Fact Find	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FFSLGITemplate002	Word file	30/11/2012 16:46	14/04/2014 10:23	Paul Chambers	(none)	All	Fact Find	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FFSLGITemplate002	Word file	12/12/2012 13:26	14/04/2014 10:23	Paul Chambers	(none)	All	Fact Find	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FFSLGITemplate003	Word file	21/01/2014 12:14	14/04/2014 10:23	Paul Chambers	(none)	All	Fact Find	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FFSLTemplate002	Word file	01/07/2012	14/04/2014 10:23	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FFSLTemplate002	Word file	17/07/2012 11:27	14/04/2014 10:23	Paul Chambers	(none)	All	Fact Find	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FFSLTemplate003	Word file	21/01/2014 12:14	14/04/2014 10:23	Paul Chambers	(none)	All	Fact Find	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Further Adverse Questions	Word file	16/03/2010 12:00	14/04/2014 10:23	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
IDD (Gloucester Only)	PDF file	11/01/2010 16:56	14/04/2014 10:23	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
IDD Croydon	Word file	28/10/2013 11:13	14/04/2014 10:23	Paul Chambers	(none)	Croydon	IDD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
IDD Document	Word file	10/12/2011 10:47	14/04/2014 10:23	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
IO Statement	Word file	26/02/2010 14:50	14/04/2014 10:23	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Marketing Test	Word file	15/08/2013 13:09	15/08/2013 13:09	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Marketing Test Document 2	Word file	13/04/2010 11:23	14/04/2014 10:23	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Mortgage closure letter	Word file	03/03/2009 10:28	14/04/2014 10:23	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Mortgage Review Letter	Word file	17/12/2012 15:19	14/04/2014 10:37	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Network Test Document	Word file	07/01/2013 17:04	14/04/2014 10:23	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
ODS Script 1	Word file	08/07/2013 19:15	14/04/2014 10:23	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
ODS Script 2	Word file	08/07/2013 19:18	14/04/2014 10:37	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
RWL	Word file	20/09/2005 14:17	14/04/2014 10:39	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
RWL Test 2	Word file	28/01/2011 09:26	14/04/2014 10:39	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Survey Instruction Exemplar	Word file	15/12/2011 15:05	14/04/2014 10:39	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Test Marketing Document	Word file	24/04/2012 14:56	13/11/2012 15:40	System Setup	(none)	All	(none)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
v3_3NewMortGIFactFind	Word file	21/01/2010 09:41	14/04/2014 10:24	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
v3_3NewMortGIFactFind	Word file	21/01/2010 09:41	14/04/2014 10:24	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
v3_3NewSLGIFactFind	Word file	21/01/2010 09:41	14/04/2014 10:24	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
v3_7_FFSLMortGITemplate	Word file	09/09/2011 15:53	14/04/2014 10:24	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
v3_7_FFSLGITemplate	Word file	09/09/2011 15:54	14/04/2014 10:24	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
v3_7_FFSLTemplate	Word file	09/09/2011 15:54	14/04/2014 10:23	Paul Chambers	(none)	All	(none)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Document Settings

Delete New Edit Add Existing File

Figure 1: Letter templates

The status of any template can be amended by selecting it and clicking on the ‘Document Settings’ button. Within the ‘Template Settings’ window that opens, ensure that ‘Include template in Marketing Mail Shot drop down’ is checked. This checkbox can also ensure that non-marketing templates are not displayed within the mail shot functionality, thereby making it easier to select the required template.

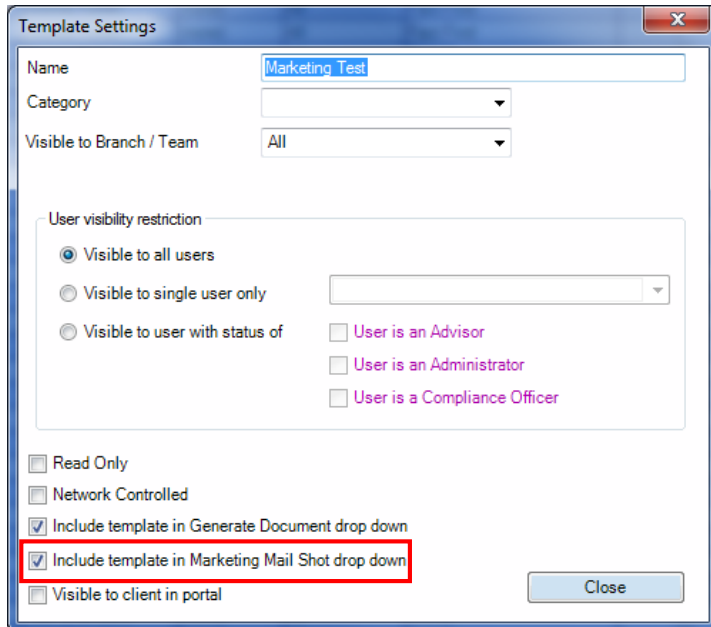


Figure 2: Template Settings Options

Selecting Target Clients

There are two methods for selecting clients to receive mail shot material: a pre-defined list based on fixed criteria or the use of an ‘Ad-Hoc’ report to identify user specified clients.

Fixed Criteria

The fixed criteria are displayed as a set of options within Marketing>Mail Shot.

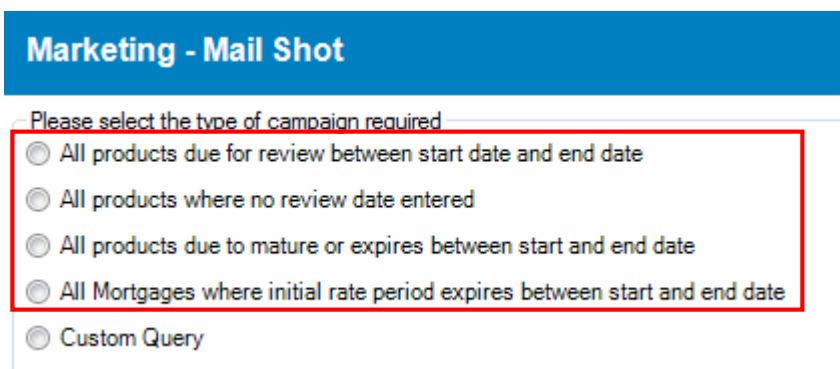


Figure 3: Mail Shot Options

Selecting any of the options outlined above will display a 'Report Selection' element on screen. This offers the option to determine date ranges (if appropriate), and the advisor(s) whose clients are to be selected.

Marketing - Mail Shot

Please select the type of campaign required

All products due for review between start date and end date

All products where no review date entered

All products due to mature or expires between start and end date

All Mortgages where initial rate period expires between start and end date

Custom Query

Run

Report Selection

Type

Start Date End Date

Advisors

<input checked="" type="checkbox"/> Dionne Pullen	<input checked="" type="checkbox"/> Test Administrator
<input checked="" type="checkbox"/> Georgina McGill	<input checked="" type="checkbox"/> Toni Martin
<input checked="" type="checkbox"/> Karen Crookes	
<input checked="" type="checkbox"/> LeeHubbard	
<input checked="" type="checkbox"/> Nicola	
<input checked="" type="checkbox"/> Patrick Costner	
<input checked="" type="checkbox"/> Paul Chambers	
<input checked="" type="checkbox"/> SimonNorcott	
<input checked="" type="checkbox"/> System Admin	
<input checked="" type="checkbox"/> System Setup	
<input checked="" type="checkbox"/> Template Test	

Figure 4: Fixed Criteria Options

Clicking on the 'Run' button will initiate the query and present the user with the 'Mail Shot List' window for completion of the mail shot, as detailed below.

Ad Hoc Criteria

The option 'Custom Query' uses the results from a user defined report that has been created within the Reports>Ad Hoc area of the Key.

Marketing - Mail Shot

Please select the type of campaign required

- All products due for review between start date and end date
- All products where no review date entered
- All products due to mature or expires between start and end date
- All Mortgages where initial rate period expires between start and end date
- Custom Query

Report Type: General (non-consent filtered)
Marketing (consent filtered)

Run

Figure 5: Custom Query Types

The initial selection is for ‘General’ or ‘Marketing’ Ad Hoc queries. General reports ignore the client’s marketing preferences and are therefore used for general client correspondence, whereas marketing reports reflect the client’s preferences (as recorded in Client>Contact>Additional Information: Marketing Consent), and therefore will not include clients who have requested no marketing communications (of the type selected in the mail shot as detailed below). The status of a report as ‘General’ or ‘Marketing’ is part of the Ad Hoc report creation process.

After the report type has been selected, and the individual reports have been loaded, the specific report can be selected from the list of those available. When a report has been selected the ‘Run’ button will be enabled to initiate the mail shot.

Marketing - Mail Shot

Please select the type of campaign required

- All products due for review between start date and end date
- All products where no review date entered
- All products due to mature or expires between start and end date
- All Mortgages where initial rate period expires between start and end date
- Custom Query

Report Type: Marketing (consent filtered)

Report Title: Applicants over 50 with income over £4
 Applicants
 Applicants Income over £35K
 Applicants over 50 with income over £40K

Run

Figure 6: Selecting a Report

Creating the Mail Shot

The ‘Mail Shot List’ dialogue window controls the recipient list, method of communication (letter or email) and the material to be sent.

The initial list displayed will be all clients who meet the criteria of the report selected, and who have provided consent for the chosen communication type (default of letter). Therefore the first action is to confirm whether a letter or email marketing mail shot is to be utilised. Note that an email mail

shot is only available if Outlook integration has been enabled within Setup>Integrations>Local PC Settings.

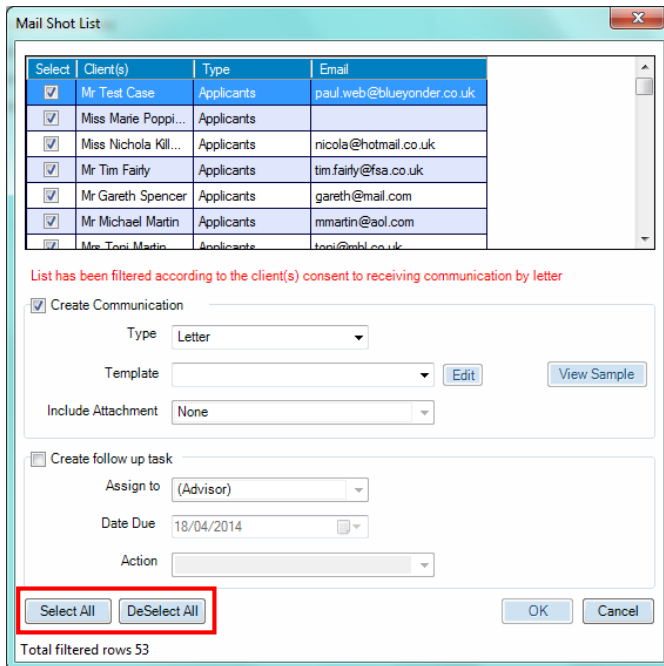


Figure 7: Mail Shot List Dialogue

Once the communication type has been selected, the client list can be refined if necessary. The ‘Select All’/‘DeSelect All’ buttons can be used to make broad changes to the client list. Only clients with a tick in the associated ‘Select’ checkbox will be included in the mail shot.

The ‘Template’ dropdown is used to select the content of the mail shot. Once selected, the ‘Edit’ button will allow the template to be edited from within the ‘Mail Shot List’ window, whilst the ‘View Sample’ button will display an example of the mail shot for confirmation that details are correct.

For email mail shots the ‘Include Attachment’ dropdown enables a secondary document to be included within the mail shot as an attachment. This list includes templates marked as marketing material, or items within the Marketing>Promotions area of the Key.

Although not necessary, it is possible to create a follow up task at this stage. If selected, the dropdown options allow the task to be assigned to the advisor or the administrator, a due date and the specific action to be carried out.

When all items have been selected, clicking on ‘OK’ will initiate the mail shot.

For Letter mail shots, the printer dialogue box will appear prior to the documents being printed.

In the case of an email mail shot, a confirmation dialogue box will be presented to confirm the number of mail shot items that will be produced.

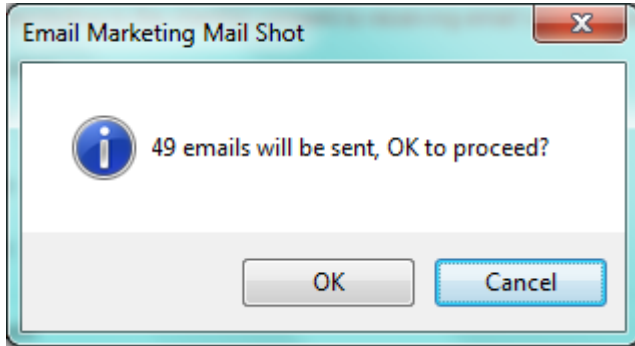


Figure 8: Mail Shot Confirmation

Assuming this is correct, click on OK to initiate the marketing mail shot. Once the mail shot run has been completed a dialogue box stating 'Complete' will be displayed.

END