Workbooks.com

JumpStart for MARKETING

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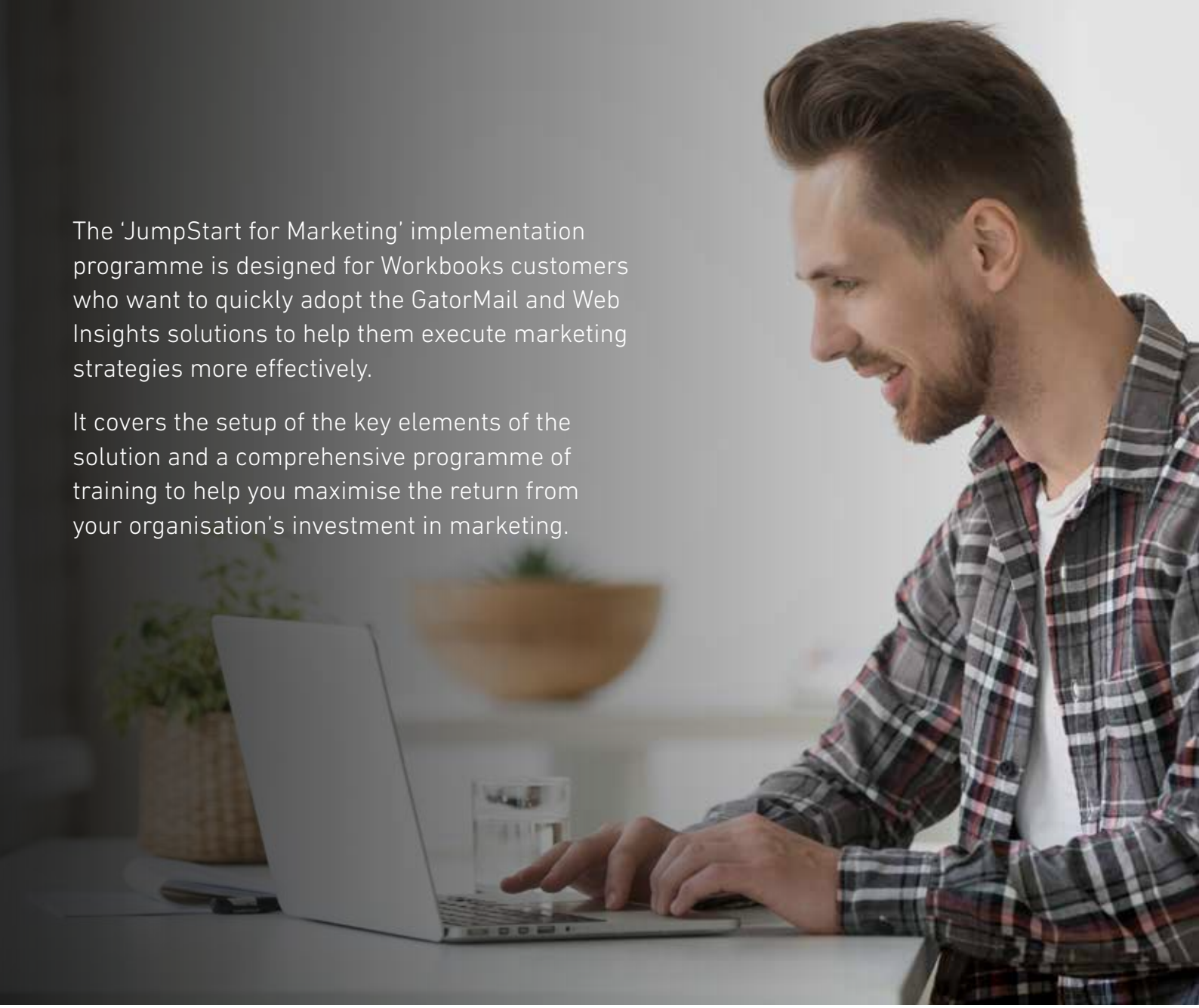
For further advice and guidance please contact Workbooks at **success@workbooks.com** or call 0118 3030 100.



The 'JumpStart for Marketing' implementation programme is designed for Workbooks customers who want to quickly adopt the GatorMail and Web Insights solutions to help them execute marketing strategies more effectively.

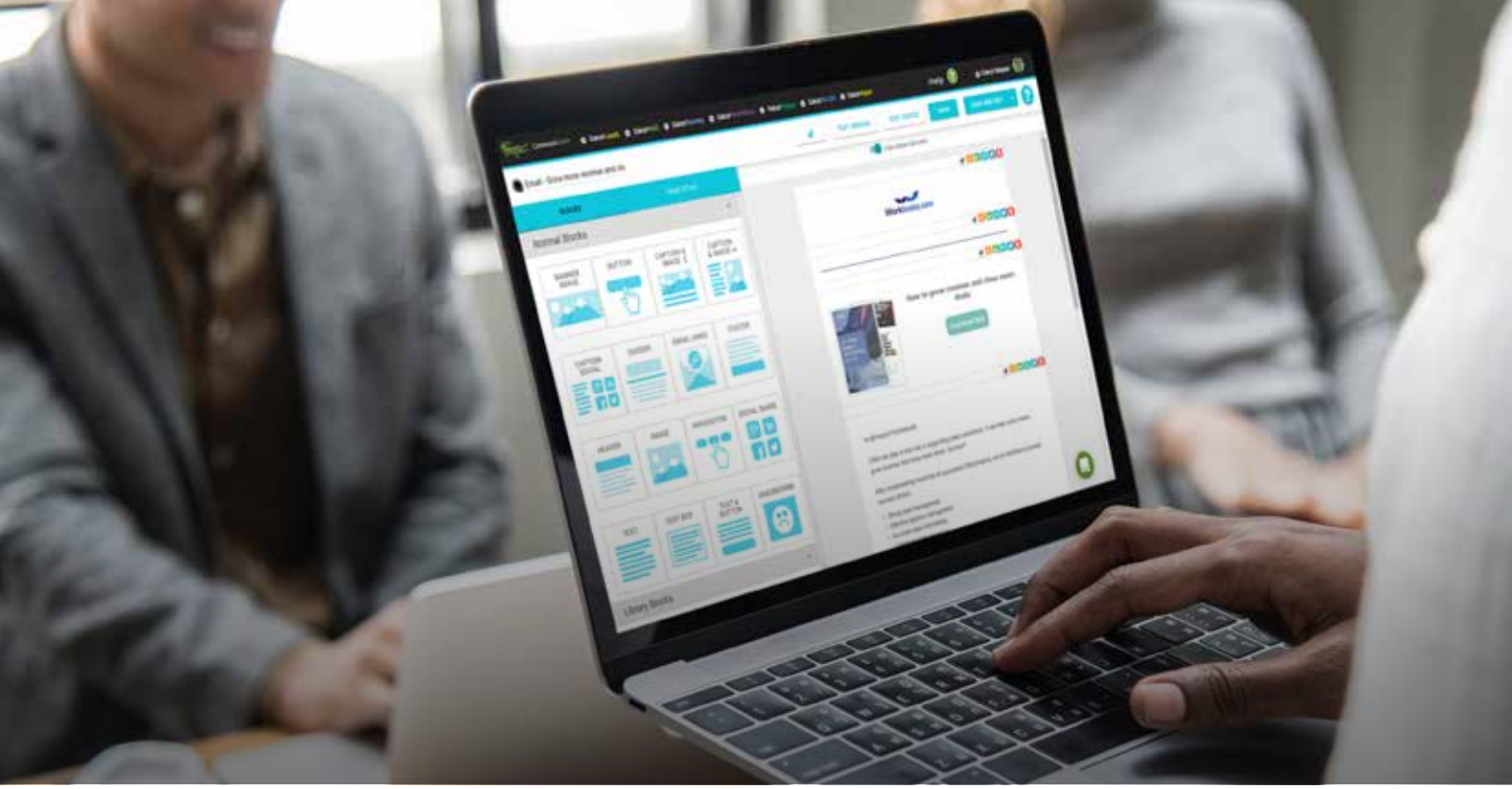
It covers the setup of the key elements of the solution and a comprehensive programme of training to help you maximise the return from your organisation's investment in marketing.

WORKBOOKS GATORMAIL

Workbooks GatorMail is an advanced email marketing tool enabling you to easily send automated, targeted marketing messages via email to any mailing list no matter how complex or dynamic. With Workbooks, you get CRM and email in 1 solution, out of the box!

WORKBOOKS WEB INSIGHTS

Workbooks Web Insights is a web analytics tool that identifies your website visitors and tracks what they are looking at (pages viewed). And because Web Insights is part of the Workbooks suite, the online activities information is automatically recorded against Organisations, Leads and People in Workbooks CRM, giving you 'in context' actionable insights that can truly transform your sales engagement.



The 'JumpStart for Marketing' implementation programme includes the following elements:

BUILDING OF 2 HTML TEMPLATES

Workbooks will build 2 HTML templates for you. This can be templates you may already have from an existing email marketing tool, or the creation of 2 completely new template designs.

The templates can then be used with both the 'Drag and Drop' email editor and the advanced HTML editor.

CREATION OF A PREFERENCE CENTRE

A GatorMail preference centre is a useful tool to reduce your email 'opt-out' rate, allowing you to reach a larger audience and improve lead flow and engagement.

The preference centre provides an alternative to a blanket 'opt-out' which allows your customers and prospects to subscribe (and unsubscribe) to the content they are interested in.

An example of a preference centre is shown to the left, providing 4 options, plus the ability to update contact details.

The 'JumpStart for Marketing' programme includes the setup of a preference centre, with up to 10 subscription options.

WEBSITE FORM CAPTURE

The setup of a Website Capture Form is included as part of the programme. Customers will be able to determine which fields are included on the form and which fields require validation, such as an email address. They can also include a reCAPTCHA to mitigate spam.

Two technologies are available for Website Capture Forms; either an embedded form, which will produce HTML that should be added to your site, or a separate landing page which can be linked to your site. We would recommend using the embedded form as it allows your web team to leverage your website CSS styling to ensure brand consistency.

Website forms can also be configured to drive a 'double opt-in' email workflow if that is part of your marketing requirements.

The completion of a Website Form by a customer or prospect will automatically create records inside the Workbooks CRM platform. The logic applied is as follows:

- If information provided on the form can be matched to a Person record, an Online Activity record is created - of type 'Web Form Submission'- and is connected to the Person record and the Web Insights score is increased.
- If it can't be matched then a new Lead record is created in Workbooks and the Online Activity record is connected to the Lead.

If you already have Website forms that you use and don't want to replace them with the Website Capture Forms, then we can provide additional HTML code which will create the relevant records in Workbooks using the same process.

The scope of the JumpStart project includes a single Website form; however, this can be used for multiple campaigns.

DOMAIN NAME SETUP

If you are using your own domain name, we will help you transfer the domain onto GatorMail and provide guidance on the DNS setup.

WEB INSIGHTS PAGE SCORING

Using page scoring allows you to identify which of your website visitors are most likely to be ready for a sales engagement.

We will help you define a page scoring strategy which will be implemented as part of the setup.

In order to make the most out of the data that will come through from Web Insights, reports and a dashboard will be created in Workbooks which will allow you to identify which People, Leads and Organisations should be followed-up on by the sales team.

TRAINING AND ENABLEMENT

Workbooks will run a 2 day training and enablement session for your team at your offices. During this session, you will learn how to use the tools to segment your data, build a campaign, create email content, send a mailshot and finally track the results back in Workbooks.

The training will help you be proficient at:

- Reporting and segmenting data, including segmenting by:
  - Industries, Job Roles, Interests, Geo-Location and Purchase History from Orders or Invoice Line Items
  - Mailing List preferences
- Creating Mailing Lists, including auto-refreshing lists from Reports
- Creating a Marketing Campaign including Campaign Members
- Creating email content using the 'Drag and Drop' editor or 'HTML editor'
- Sending emails and using SendForensics to assess deliverability of content
- Using GatorMail tools to track open rates, bounces and deliverability
- Using Workbooks reporting to:
  - Track Online Activities from Marketing Campaigns and Mailing Lists
  - Track hot prospects based on page views, downloads and online activity scores

IMPLEMENTATION *approach*

The 'JumpStart for Marketing' implementation is designed to get your organisation using the platform within 2 weeks. The implementation consists of 4 days of setup consultancy delivered remotely, followed by the 2 day on-site training and enablement session.

In order to start the setup process, we will need the following from clients:

- Domain name to be moved
- Designs of 2 HTML templates
- Design of the preference centre including details of subscription lists

Days	Overview	Description
Days 1 to 4	Configuration & Build	Delivered remotely, Workbooks will create the HTML templates, build the preference centre, configure the Workbooks and GatorMail connectors and build the HTML form. Workbooks will test this environment before we move to customer training.
Days 5 & 6	Training & Enablement	Delivered on-site, we will train your team and handhold you through sending your first campaign.

PROJECT
scope & cost

PROJECT SCOPE

The scope of the 'JumpStart for Marketing' implementation is defined in this document. It does not include any other elements of configuration, reporting or data migration.

For clarity, the following elements are specifically excluded from the scope of 'JumpStart for Marketing':

- Data Migration or Importing. You are expected to have the marketing contacts already in Workbooks CRM
- Training around refresh, recurring or workflow campaigns
- Surveys

PROGRAMME COSTS

The 'JumpStart for Marketing' programme includes:

- 6 x days of implementation consultancy at £895 per day

The total cost for the 'JumpStart for Marketing' programme is £5,370 + VAT + Expenses. Expenses will be changed in line with our standard policy, set out in our **terms of service**.