CampusLogin | Marketing

Marketing Training Manual

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Settings

1. **Accessing Marketing Settings**
    a. You are able to access the Marketing functionality by clicking the “Marketing” tab at the top of the page.
    b. Once on the marketing tab, you can click the sub tab called “Settings” to access the marketing settings.
    c. If you do not have access to the marketing tab you can request access from your schools administrator
2. **Managing Media and Costs**
    a. Once on the “Settings” tab you can select the “Media” tool

   b. The media tool allows you to enter all of the advertising sources for your school
   c. All advertising sources are categorized. You are able to create new categories and media (Ex. Category = Social Media, Source = Facebook), by clicking the "Create New Media Category" and "Create New Media Source" buttons.
   d. To associate costs to each media you can select the “Enter Media Costs” button. There you can enter a flat yearly fee, a monthly fee, a percentage of tuition, pay-per-lead or free. For the monthly fee media, you are able to enter a fixed monthly fee or a different fee by month. You are then able to view cost per lead, to cost per student reporting (See the Reporting section below).
3. **Managing Pay-Per-Lead Vendors**
   a. There is special functionality for pay-per-lead vendors. Pay-per-lead vendors are able to post leads directly into the system. Leads will automatically be tracked by vendor.
   b. There is automatically a “Pay-Per-Lead Vendors” database and media category. The category will list all the vendors that you create. And you will be able to view leads by vendor, and conversion to student. This database/media category can be renamed if you would like.
   c. To create a new pay-per-lead vendor, click the “Marketing” tab at the top of the page, and then select “Input a New Contact” from left navigation.
   d. In the “Contact Type” drop down select the “Pay-Per-Lead Vendors” database and enter the details of your vendor. The vendor name and email address are required fields.
   e. Click Save to create the new vendor.
   f. After clicking Save you will see a “Send an Email” button towards the top right of the page. Select this option and in the template drop down select “Form Post Instructions”.
   g. This will send the vendor everything they need to begin posting leads directly into your database. And have those tracked automatically as leads from that specific vendor.
   h. A profile is created for each vendor, so you can email, take notes, schedule follow ups, etc with the vendor. All of the CRM functionality is available to you for communicating with your vendors
4. **Validation**
   a. Click “Settings” within the Marketing tab
   b. Select the “Validation” admin tool. Here you can control what fields are required for vendor leads, as well as leads entered manually.
5. **Duplicates**
   a. Click “Settings” within the Marketing tab
   b. Select the “Duplicates” admin tool. CampusLogin automatically blocks duplicates by email, and telephone plus first name. But you can access the duplicates admin tool to search for potential duplicates and to maintain the integrity of your database/reporting.
   c. In the duplicates tool you can merge duplicate leads, so they only count once on reporting and do not bring down your conversion rates.
6. **Fiscal**
   a. Click “Settings” within the Marketing tab

b. Select the “Fiscal” admin tool.
c. Here you can enter your schools Fiscal Year, if it is different from the standard calendar year. This will then be available in reporting for quick and easy access.

Reporting

1. **Accessing Media Reports**
   a. To access the Marketing reports click on the “Leads” tab at the top of the page
   b. In the “Reporting” flyout at the top left of the page, select the “Marketing Reports” category.
   c. Here you can access all of the marketing reports, including:
2. **By Media Report**
   a. The “By Media Report” shows you how many leads you have by category, as well as for each specific media source.
   b. The “By Media Report”, like all other reports, will not just show how many leads you have, and how many students you have converted, but it will show the progress for each step in your admissions process (such as Lead, to Appointment, to Applicant, etc). This process is customized and specific to your school. If you wish to add/remove a step, you can speak to your school’s administrator.
   c. All numbers in the report are clickable to view the leads, and go to their contact sheet to see all the follow up that has been done with the lead.
   d. In the report filter you can select which date range you would like to view reporting on, as well as if you would like to include the cost information in the report results.
3. **By Input Source Report**
   a. The “By Input Source Report” shows you how many leads you have, not by media source, but by the type of form they filled out to get into the database. So you can see which types of leads are most popular. CampusLogin offers many different types of forms (lead forms, tablet forms, book a tour forms, open house forms, applications forms). And supports Pay-Per-Lead vendors, spreadsheet uploads, as well as leads being inputted manually. The “By Input Source” report will show you how many leads/students you have by all of these different sources.

Searching & Communication

1. **Databases**
   a. CampusLogin automatically creates databases for your leads, students, alumni, employers, staff, high schools and pay-per-lead vendors
   b. You are able to search and communicate with all individuals in all databases that you have access to.

c. You are able to create unlimited custom databases as well, for things like Newsletter, Corporate Training, Clients, etc.
d. All CampusLogin communication functionality will be available to you for custom databases as well.
e. If you wish to create a new custom database please speak to your school's administrator.

2. **Searching Your Database**
   a. To find a lead by name, email, or telephone use the "Quick Search" on the left navigation.
   b. To query your database by any field on your contact sheet use the "Advanced Search".
   c. The "Advanced Search" is also used when mass communicating.
3. **Mass Communication**
   a. In the "Advanced Search" results you will see short cut links to "Send a Mass Email", "Print Mass Letters" or "Send Mass Text Message" to your targeted group of leads
   b. These options are also available on the left navigation
   c. If you do an "Advanced Search" with too many results to call in one day you are able to create a "Call Campaign" and work that group of leads over a longer period of time
4. **Templates**
   a. If you wish to save a templates for future use (E-Mail, Letter or Text Message) you can create them using the "Edit Templates" page
   b. These templates will appear when you send a message or print a letter
   c. You can draw any field into your template from the contact sheet of the lead (such as First Name, Program Name, Start Date, etc) by using the "Insert Field" drop down

Incoming E-Mails and Text Messages

5. **Managing Incoming Email in CampusLogin (Optional)**
   a. You are able to run incoming emails through CampusLogin. This will automatically associate all incoming emails to the contact sheet that you are communicating with. So you can see all notes, emails (incoming/outgoing), and all calendar appointments in one spot, chronologically.
   b. To set up your email select "School Settings" by putting your mouse over your name on the top right of the page. Then selecting the "Personal" admin tool and then the "Email Account" tab.
6. **Un-Read Messages**
   a. On the left navigation you are able to access emails by clicking "Unread Mail".
   b. These new messages stay on the page until you have read and/or replied to them
   c. Once you read them they will be filled away to the leads contact sheet indefinitely
   d. If you wish to follow up with a message later you can click "Keep as Un-Read"
   e. If you wish to view a traditional inbox of all messages in chronological order you can by selecting "Inbox" in the "View" drop down
7. **Sent Emails**

a. When you send a mass email or individual email CampusLogin will automatically track if it is received, opened and if they click a link within the email
b. You will see this information on the "Sent Mail" page
c. This is done by encoding a unique, non-visible image in all emails, and if that image loads we know the email was read
d. A tracking code is also added to each hyperlink so you can see if it was clicked or not

Contact Sheet (CRM)

7. **Contact Sheet**
    a. Once you go to an individuals profile (through Quick Search, Advanced Search or Reporting) you can communicate with that individual and see all the previous communication history.
    b. You are able to add/update the profile and be sure to save your changes.
    c. The profile middle column contains all of the details about the contact, and is completely customizable by your school.
    d. The right column provides all of the communication history
        i. All incoming and outgoing emails are automatically saved to the contact sheet
        ii. All incoming and outgoing text messages are automatically saved to the contact sheet
        iii. You are able to print letters/documents and create custom packages for your prospect
        iv. All previous communication is stored chronologically by follow up type
        v. You are able to schedule follow up phone calls and appointments on your calendar
8. **Appointments**
    a. When scheduling an appointment you must select an appointment type.
    b. For phone calls you will need to disposition your call and save a phone call outcome (Call Attempted, Call Received, Call Left Message, Call Complete).
    c. For all appointments you must specify if the appointment showed (all appointments are defaulted to no show).
    d. Phone calls can be scheduled at specific times or added to the generic call list below the calendar.
    e. When dispositioning appointments you are able to schedule your next follow up on the same screen if you would like.
    f. All appointments appear in the prospects communication history and on your calendar.
    g. You are able to book an appointment on someone else's calendar by selecting their name in the staff drop down (at the top of the calendar page).
9. **Calendar**
    a. You can double click on any calendar item to view the appointment details

b. You can view other users calendar in the “Staff” drop down
c. You are able to schedule appointments on other users calendars
d. Items that have not been dispositioned appear in bold
e. Once they are dispositioned they are no longer bold
f. If an item if not completed it will automatically be carried over to the next day