



**improve it 360**  
an EverCommerce Solution

---

# Campaign Reports & Troubleshooting Re-Calls

---

# Agenda

Out-of-the-Box Reports and the metrics that are gleaned from them

Campaign Philosophies – no one wants to play Plinko with their Leads!

The importance of setting Mutually Exclusive Filter Criteria for ALL Campaigns

What if we can't get through all our Pending Re-Calls for the day?

Difference between Retiring a Campaign and Releasing Campaign Members

# Call Center & Campaign Reports



**Campaign Results by Campaign:** Shows which Campaigns are being called and provides the total Disposition count for each Campaign. This report can be used to determine how many Calls your team can reasonably make in a Day, or a Week's time. (Be a conscientious manager, know if your team is **clicking but not calling!**)



**Campaign Results by Rep:** Provides total call volume for each of your telemarketers and allow you to spot a trend in the agent's performance. Is one caller better at engaging with Rehash opportunities?



**Marketing Opps not in Campaigns:** Used to identify Marketing Opportunities not getting pulled into a Campaign. Can use used to create a Campaign to target these leads.

**Re-Calls by Campaign-** used to identify how many Re-Calls are scheduled within your Campaigns.

Review this [Help Article](#) to learn more about the Out of the Box improveit 360 Reports and Dashboards

# Campaign Structure Philosophy

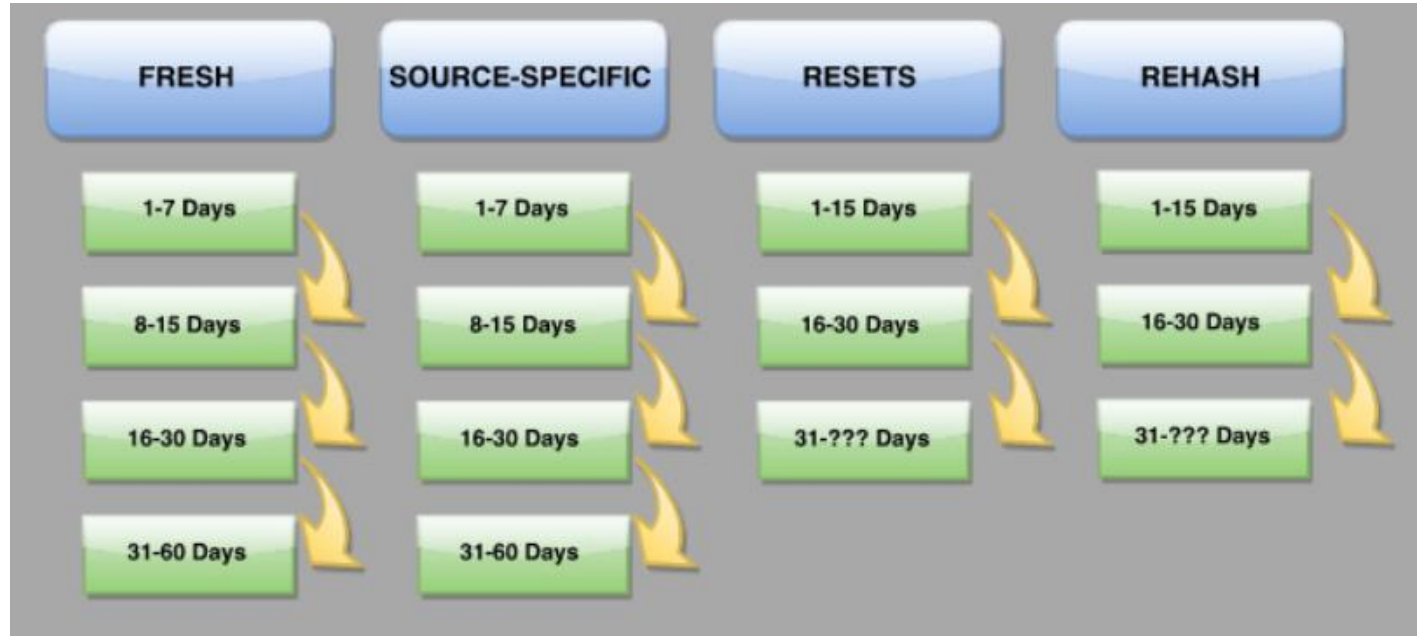
*No Lead should qualify for more than one Campaign*

## Filter Criteria

Prevents a Lead from qualifying for more than one Campaign

## Thinking of creating new Campaigns?

Evaluate the Filters you have in place, **first!**



EVALUATE ALL ACTIVE CAMPAIGNS

# The importance of Mutual Exclusivity between Campaigns

**Filters**

Object	Field	Operator	Value	
Lead Source	Taken On	On or before	0 days in the past	x AND
Lead Source	Taken On	On or after	7 days in the past	x AND
Marketing Opportunity	Due Date	On or before	0 days in the past	x AND
Marketing Opportunity	Type	Equal to	Set Appointment	x AND
Lead Source	Source Type	Not equal to	Existing Database	x AND
Lead Source	Source Name	Equal to	HomeAdvisor	x AND

Create an opposing Filter on ALL other Campaigns

Ensure you know exactly where each lead will land

**Filters**

Object	Field	Operator	Value	
Lead Source	Taken On	On or before	0 days in the past	x AND
Lead Source	Taken On	On or after	7 days in the past	x AND
Marketing Opportunity	Due Date	On or before	0 days in the past	x AND
Marketing Opportunity	Type	Equal to	Set Appointment	x AND
Lead Source	Source Type	Not equal to	Existing Database	x AND
Lead Source	Source Name	Not equal to	HomeAdvisor	x AND



# Too many Re-Calls? Adjust Campaign Settings...

*Campaign Results* grouped by Day and *Re-Calls by Campaign* Reports

These two (2) reports will tell you if you have more re-calls scheduled than what your staff can reasonably handle.



## Hiring more Call Center agents?

Increase the Campaign's **Re-call frequency** to call more often, completing the re-calls sooner!

## Not Hiring additional Staff?

Decrease the Campaign's **Call Limit Setting**, ensuring the Lead is released so you call the freshest inquiries.

# ...still too many Re-Calls? Release Campaign Members

Click **Retire**

Campaign  
★ Referrals: Intro Stage  
◀ Go to List: Campaigns

Show Feed

Campaign

**Retire** Edit Update Clone Delete

Campaign Name Referrals: Intro Stage Start Date 2/26/2019  
Type Phone Retired Date  
Update Method Continuous Description  
Assign To All Telemarketers Last Modified By Olivia Admin  
Created By Olivia Admin

**Mark as completed** will Complete the current Campaign Member, allowing the Lead to fall organically into the Campaign it qualifies for based on the Prospect's Marketing Opportunity Due date, Taken On date and the active Campaigns' Filter Criteria.

## 2. Resolve pending Re-Calls

Total pending Re-Calls: 5

View by Re-Call reason: No Answer

**Mark as completed** Move to another campaign...

<input checked="" type="checkbox"/>	Campaign Member	Calls ↓	Re-Call Set At	Re-Call Set By	Scheduled Re-Call Time
<input checked="" type="checkbox"/>	<a href="#">Charles, Charlotte</a>	1 [ <a href="#">Details</a> ]	9/23/2020 2:11 PM	<a href="#">Olivia Admin</a>	9/24/2020 2:11 PM
<input checked="" type="checkbox"/>	<a href="#">Test, Simon</a>	6 [ <a href="#">Details</a> ]	9/23/2020 2:10 PM	<a href="#">Olivia Admin</a>	9/24/2020 2:10 PM

Follow along with our [Help Article](#) for how to Retire a Campaign

RELEASE CAMPAIGN MEMBERS

# How to reach us?

1. Admins – Use the Help Bot within your system: Click **Get in Touch**
2. Open a Ticket at:  
<https://support.improveit360.com/>
3. Or Email Us: [support@improveit360.com](mailto:support@improveit360.com)

Support Office Hours:

Monday – Friday, 9am-5:30pm Eastern time

