Agenda

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

The importance of Mutual Exclusivity for Filters in ALL Campaigns

If you want to Create a new Campaign, STOP, Evaluate what is Active already!

Once you Set new Exclusion Filters you MUST Release ALL Campaign Members

Then Create your new Campaign with the new Inclusion Filters

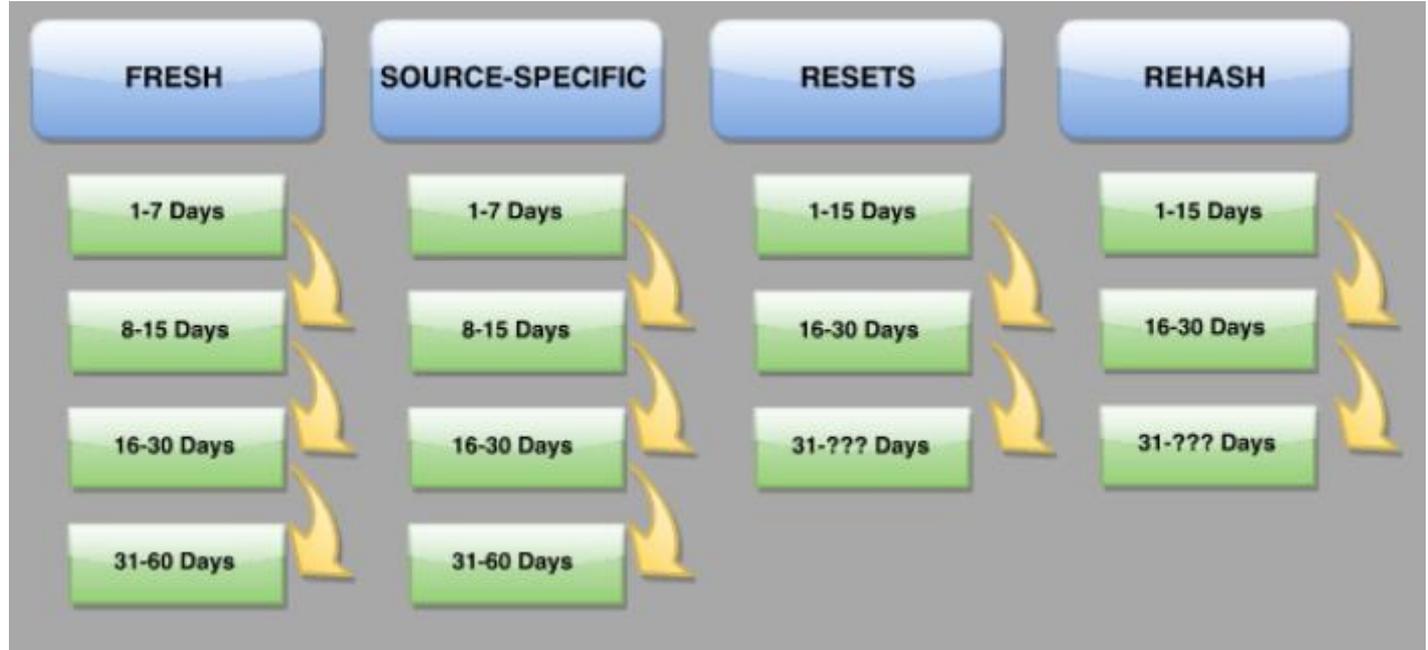Bonus topic – Identifying when you have too many Re-calls in a Campaign

Campaign Structure Philosophy

No Lead should qualify for more than one Campaign at a time

Filter Criteria
Prevents a Lead from qualifying for more than one Campaign

A good Campaign structure ensures **Mutual Exclusivity**

FRESH	SOURCE-SPECIFIC	RESETS	REHASH
1-7 Days	1-7 Days	1-15 Days	1-15 Days
8-15 Days	8-15 Days	16-30 Days	16-30 Days
16-30 Days	16-30 Days	31-??? Days	31-??? Days
31-60 Days	31-60 Days		

Campaign Structure Philosophy

Eventually everyone falls into one of two (2) groups:

Filter Criteria
Should eliminate leads that should not be in the Campaign.

Campaigns do NOT check other Campaigns to make sure a Lead isn't eligible for another Campaign

Prospects who never purchased

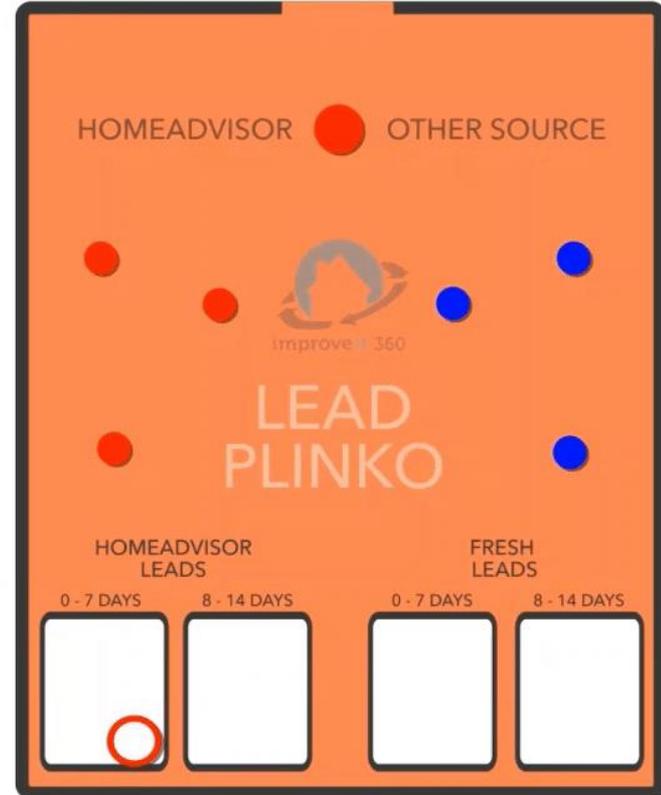Prospects who did purchase

Mutually Exclusive Filter Example

Create an opposing Filter on **ALL** other Campaigns

Ensure you know exactly where each lead will land

STOP! Evaluate the Filters for ALL Active Campaigns

Do not create any Campaigns until you understand the current structure

Goal: The Call Center Manager wants to Target Fresh Leads who are coming in from HomeAdvisor

NOTE: There is nothing to EXCLUDE Leads based on the Source, HomeAdvisor

Create Filters to Exclude Records based on Source

1 Open all your Fresh Leads campaigns which are Active. **Add a Filter** to Exclude leads from the Source Name of HomeAdvisor

Filters

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

This ensures new Leads coming in who are coming from HomeAdvisor will not get pulled into the Fresh Leads Campaign.

If HomeAdvisor leads were already called*, Remove existing Campaign Members

2

Click **Retire** on all existing Fresh Leads campaigns and Release all the existing 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...]

☑	Campaign Member	Calls ↓	Re-Call Set At	Re-Call Set By	Scheduled Re-Call Time
☑	Charles, Charlotte	1 [Details]	9/23/2020 2:11 PM	Olivia Admin	9/24/2020 2:11 PM
☑	Test, Simon	6 [Details]	9/23/2020 2:10 PM	Olivia Admin	9/24/2020 2:10 PM

* This step is only required if you have been calling Home Advisor leads in your Fresh Leads Campaigns.

Create New Campaigns

3 Once you have Excluded the Criteria from all the other Campaigns, you can Create NEW Campaigns. Use the **Clone** feature to make it easier.

Filters

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

Campaign Name: Home Advisor Leads 1-7 Days
Type: Phone
Update Method: Continuous

Be sure to give the Campaign a Unique Name

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

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