

# Marketing Opportunities

Create and Complete Marketing Opps,  
Use List Views, Assign Marketing Opps,  
Use the Call Queue, Report on  
Marketing Opps not in a Campaign



improveit 360

# Agenda

- What are Marketing Opportunities?
- What actions Create a Marketing Opportunity?
- What Completes a Marketing Opportunity?
- What does it mean to Assign a Marketing Opportunity?
- Working Marketing Opportunities from List Views
- Automate Type and Type Details based on Previous Appointment's Result
- Identify Marketing Opportunities not in a Campaign
- Why wouldn't someone have an open Marketing Opportunity?

# What are Marketing Opportunities?

- A Digital Sticky Note
- Reminders to contact a Prospect at three stages of your business relationship with them
- When...



New Lead Source is created

Set the Appointment!

Appointment Resulted as not Sold

Rehash or Reset!

180 Days\* After a Sale is Final

Ask for Review, Referral or Repeat business!

\* Number of days can be customized

# What actions Create a Marketing Opportunity?

1. A new **Lead Source** (or eLead) created for an existing Prospect
2. **Resulting** an Appointment as anything but Sold
3. Clicking **Remarket** from the Call Queue\*

**Step 3: Create a Marketing Opportunity**

Please create a new Marketing Opportunity for "Demoranville, Man".

Prospect	Demoranville, Man	Due Date	5/17/2024 [ 5/15/2024 ]
Type	Rehash Appointment	Assigned To	<input type="text"/>
Type Details	--None--	New Lead won't close Opportunity	<input type="checkbox"/>
Comments	<input type="text"/>		

**Disposition**

Complete

Create New ▾

- Lead Source
- Appointment
- Sale
- Marketing Opportunity

\* Based on Campaign Settings

# What actions Create a Marketing Opportunity?

4. Entering a **Final On** date on a Sale, Due 180 Days after

Settings

Sources Product Categories Email **Advanced** Other Tasks

Save

Marketing Opportunity Delay after Sale marked Final  days

This setting can be adjusted by your Admin User on the Settings > **Advanced** Tab

**Sale Status**

Working  
Net  
Paid In Full  
Final

Sold On  [5/15/2024]  
Net On  [5/15/2024]  
Paid in Full On  [5/15/2024]  
Final On  [5/15/2024]

June 2022

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		1

Today

**Sale Items**

Product Name  
Basic Window

Existing Database Source Name

# Type and Type Detail

Set  
Appointment

New eLead or Lead Source will default to this Type  
**Type Detail** differentiates “Set Appointment” Opps  
This Type might include Cancel Resets

Rehash /  
Follow-up

Demoed, Not Sold >> Type: Rehash Appointment  
Follow-up >> Type: Follow-up Appointment

Set  
Appointment

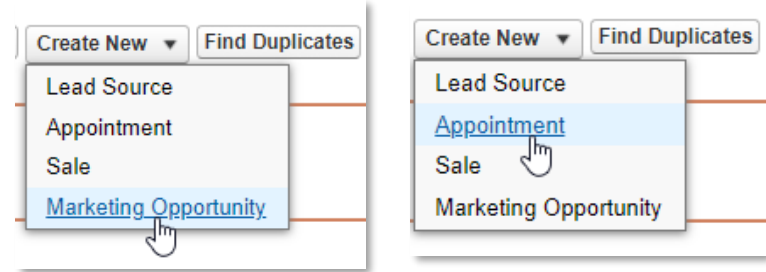
Existing Database customers will default to this Type  
**Source** differentiates these from other “Set Appointment”  
Opportunities

**Type Detail:** When resulting as Canceled, No Show or Not Demoed, select a Type Detail of “Reset”

Identify the “Reset” opportunities and differentiate them from the other “Set Appointment” opportunities.

# What Completes a Marketing Opportunity?

1. Scheduling an Appointment
2. Flagging the Prospect as Not Qualified
3. Opening a new Marketing Opportunity



**Marketing Restrictions**

TCPA

Wrong Number

Not Qualified Reason(s)

**Available**

- Out of Area
- Renter/Non-Owner
- Mobile Home
- Other

**Chosen**

- Bad or Old Data

Opt Out Email

Opt Out Mail

Restriction Comments

Not current Homeowner

# What does it mean to Assign a Marketing Opportunity?


Want your Sales Reps to work their own Reshases?


Have an inside Sales team who work the Reshases?

Does the Marketing Opp still qualify for the Call Queue if it's been Assigned? No.

You will need to unassign Marketing Opportunities after a certain time period, if you want them to fall into the Call Queue at some point in the future.

### Marketing Opportunities

 **Assigned MOs not Completed** ▼ [Edit](#) | [Delete](#) | [Create New View](#)

[Print/Email](#) 

<input type="checkbox"/>	Action	Marketing Opportunity Name ↑	Assigned To	Comments	Completed Date
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Agnello, Vincenzo: Rehash Appoi...</a>	<a href="#">Sammy Sales</a>	This ta...	
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Apartments, Acorn: Rehash Appo...</a>	<a href="#">Sammy Sales</a>		
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Charles, Charlotte: Rehash Appoi...</a>	<a href="#">Bertram Sales Rep</a>		
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Test_alexander: Rehash Appoint...</a>	<a href="#">Bertram Sales Rep</a>	getting...	
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Test_Marino: Rehash Appointment</a>	<a href="#">Bobby Sales Rep</a>		
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Test_P Taylor: Rehash Appointment</a>	<a href="#">Billy Sales Rep</a>	This ta...	
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Test_Simon: Set Appointment</a>	<a href="#">Billy Sales Rep</a>		



# Using List Views to work Marketing Opportunities

The screenshot shows a web application interface for 'Marketing Opportunities'. At the top, there is a navigation bar with tabs: Marketing Opportunities, Appointments, Sales, Projects, Campaigns, Dashboards, Reports, First Time Setup, Production Grid, Staff Calendar, and Settings. Below the navigation bar, the main header reads 'Marketing Opportunities' and includes a dropdown menu set to 'Set Appointment - Target' with links for 'Edit', 'Delete', and 'Create New View'. A 'Print/Email' button is also visible. The main content area displays a table with columns: Action, Marketing Opportuni..., Source, Type, T..., C..., Pr..., A..., Due Date, Days Past Due, and Time Since Opportun... The table contains six rows of data, each with a checkbox and links for 'Edit' and 'Del'.

Action	Marketing Opportuni...	Source	Type	T...	C...	Pr...	A...	Due Date	Days Past Due	Time Since Opportun...
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Villaplana, Tomas: S...	2024 Spring Postcard	Set Appointment	T...			4/29/2024	18	18 days 2 hours 9 ...
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Grose, Cory: Set App...	2024 Spring Postcard	Set Appointment	T...			4/29/2024	18	18 days 2 hours 9 min
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Lenske, Maxwell: Set ...	2024 Ohio State Fair	Set Appointment	T...			4/29/2024	18	18 days 2 hours 12 min
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Maslen, Eugenia: Se...	2024 Home and Gar...							
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Michalik, Abdul: Set ...	2024 Home and Gar...							
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Trojanovich, Alexis: ...	2024 Home and Gar...							
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	Ort, Diane: Set Appoj...	2024 Ohio State Fair							

## Common List Views

- Set Appointment - Target


## Filter By Additional Fields (Optional):


	Field	Operator	Value
1.	Can Contact by Phone	equals	True
2.	Type	equals	Set Appointment
3.	Prospect Status	equals	Target
4.	Due Date	less or equal	TODAY
5.	Prospect Not Qualified	not equal to	TRUE
6.	Completed Date	equals	

[Add Row](#) [Remove Row](#)

# Using List Views to work Marketing Opportunities

### Marketing Opportunities

 **Cancel Reset** ▼ [Edit](#) | [Delete](#) | [Create New View](#)

[Print/Email](#) 

<input type="checkbox"/>	Action	Marketing Opportu...	Assigned To	Campaign M...	Interested In	Previous Appointm...	Due Date	Completed Date
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Albery, Mariana: Se...</a>				<a href="#">Albery, Mariana F...</a>	4/29/2024	
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Ritter, Elizabeth: ...</a>			Windows	<a href="#">Ritter, Elizabeth Wi...</a>	3/6/2024	
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Test2, Alexander: S...</a>			Siding	<a href="#">Test2, Alexander Si...</a>	2/17/2023	

Common List Views

- Cancel Resets

**Tips & Tricks:** For a Cancel Reset list, always put the Previous Appointment as a field displayed in the list. It is a clickable link to the Appointment!

#### Filter By Additional Fields (Optional):

	Field	Operator	Value
1.	Type <span>▼</span>	equals <span>▼</span>	Set Appointment
2.	Type Details <span>▼</span>	equals <span>▼</span>	Reset
3.	Completed Date <span>▼</span>	equals <span>▼</span>	
4.	Prospect Not Qualified <span>▼</span>	not equal to <span>▼</span>	True
5.	Can Contact by Phone <span>▼</span>	equals <span>▼</span>	True
6.	Previous Appointment <span>▼</span>	not equal to <span>▼</span>	

# Using List Views to work Marketing Opportunities

Marketing Opportunities									
All Refresh Appointment Tasks Due <span>Edit   Delete   Create New View</span>									
Print/Email <span>A   B   C   D   E   F   G   H   I   J   K   L   M</span>									
Action	Marketing Opportu...	Source	Type	Typ...	Comments	Previou...	Assigned To	Due Date	
<input type="checkbox"/> Edit   Del	<a href="#">Agnello, Vincenzo:...</a>	<a href="#">Home Dep...</a>	Rehash Appointment		This task was ...	<a href="#">Agnell...</a>	<a href="#">Olivia Admin</a>	2/29/2024	
<input type="checkbox"/> Edit   Del	<a href="#">Apartments, Acorn:...</a>	<a href="#">Madison C...</a>	Rehash Appointment			<a href="#">Apart...</a>	<a href="#">Olivia Admin</a>	2/15/2024	
<input type="checkbox"/> Edit   Del	<a href="#">Charles, Charlotte:...</a>	<a href="#">Broward Co...</a>	Rehash Appointment			<a href="#">Charl...</a>	<a href="#">Olivia Admin</a>	3/1/2024	
<input type="checkbox"/> Edit   Del	<a href="#">Test_alexander: Re...</a>	<a href="#">Broward Co...</a>	Rehash Appointment		getting other esti...	<a href="#">Test_...</a>	<a href="#">Olivia Admin</a>	1/31/2024	
<input type="checkbox"/> Edit   Del	<a href="#">Test_Dalton: Rehas...</a>	<a href="#">2020 Sprin...</a>	Rehash Appointment	Retry	ReHash Quote f...	<a href="#">Test_D...</a>			
<input type="checkbox"/> Edit   Del	<a href="#">Test_Marino: Rehas...</a>	<a href="#">104.2FM</a>	Rehash Appointment			<a href="#">Test_M...</a>			
<input type="checkbox"/> Edit   Del	<a href="#">Test_P Taylor: Reha...</a>	<a href="#">Auto Show</a>	Rehash Appointment		This task was au...	<a href="#">Test_P...</a>			

- Common List Views
- Refresh Appointments

**Step 2. Specify Filter Criteria**

**Filter By Owner:**

All Marketing Opportunities

My Marketing Opportunities

**Filter By Additional Fields (Optional):**

Field	Operator	Value	
Type	equals	Rehash Appointment	AND
Due Date	less or equal	TODAY	AND
Can Contact by Phone	equals	True	AND
Prospect Not Qualified	not equal to	True	AND
Completed Date	equals		

# Automate Type and Type Detail

Marketing Opportunity  
Ritter, Elizabeth: Set Appointment  
« Go to List: Marketing Opportunities

Elizabeth Ritter  
131 Fairlawn Dr  
Columbus, OH 43214  
luz@test.com

Activity History [0] | Marketing Opportunity History | Notes & Attachments [0]

Marketing Opportunity Detail  
[Edit] [Delete] [Attachment Manager] [Create New] [Print / Email]

Information

Type	Set Appointment	Taken On	3/20/2019
Type Details	Reset	Taker	Sammy Sales
Assigned To		Previous Appointment	Ritter, Elizabeth Windows
Due Date	3/6/2024		
Days Past Due	75		
Comments			

- A. Assign Type and Type Detail every time based on Appointment Result chosen
- B. Make it easier to identify Resets in List Views
- C. Keep “Type” and “Type Detail” consistent regardless of User’s selection when resulting

Step 3: Create a Marketing Opportunity

Please create a new Marketing Opportunity for "Frauenfelder, Cynthia".

Prospect Frauenfelder, Cynthia

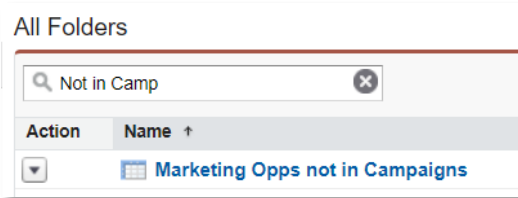
Type Set Appointment

Type Details --None--

Comments --None--  
Call Back  
Retry  
Reset

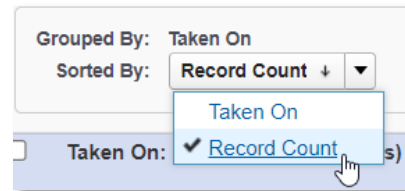
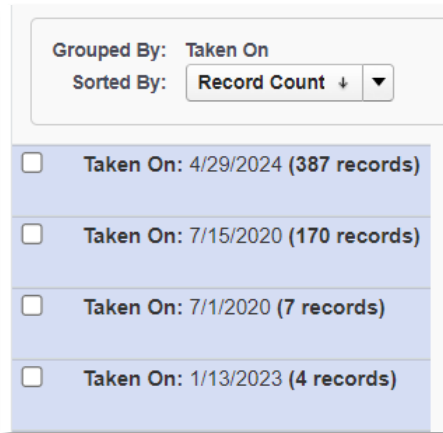
[Back] [Save] [Cancel]

# Identify Marketing Opportunities not in a Campaign



Use the Out of the Box Report!  
**Marketing Opps not in Campaigns**

Pull other fields into the report to see more information about those Marketing Opps like the Source and Taker. Re-Group the Report by Source to see if these Leads are coming from the same lead provider.



Sort the Report by Record count to see if there are large groups of leads for a specific timeframe or Source

# Create a Campaign to pull in Marketing Opps not in Campaign

Set your Filters within the Campaign to target the leads you identified within the Report.

**Campaign Criteria**

**Filters**

	Object	Field	Operator	Value	
1	Marketing Opportunity	Due Date	On or before	0 days in the past	x
2	Lead Source	Taken On	Equal to	7/15/2020 [ 5/20/2024 ]	x
3	Lead Source	Taken On	Equal to	4/29/2024 [ 5/20/2024 ]	x

[Clear Advanced Options](#)

1 AND (2 OR 3)

Combine filter criteria rows using ANDs and ORs. Example: (1 AND 2) OR 3

In this example most of the leads were taken on either 4/29/24 or 7/15/2020 so I will create a Campaign which targets those specific dates and uses Custom Filter Logic.

# Why doesn't someone have an open Marketing Opportunity?

## ▼ Closed-Loop Marketing ? [What is a Marketing Opportunity?](#)

There are **623 Marketing Opportunities** ready to work ?

There are **20 past Appointments** that have no result ?

There are **54 Sales over 180 days old** that are not yet Final ?

1. An Appointment hasn't been **Resulted**
2. A Sale hasn't been marked **Final**
3. A Marketing Opportunity was **Completed** without a new one being opened

Prospects without an open MO would not fall into a Call Campaign

Action	Appointment Name
Result	<a href="#">Alger, Bertha Windows</a>
Result	<a href="#">Bravata, Alyce Doors</a>
Result	<a href="#">Chasse, Kirsten Windows</a>
Result	<a href="#">Edberg, Tomas Roofing</a>
Result	<a href="#">Frauenfelder, Cynthia Bathrooms</a>
Result	<a href="#">Gayhart, Damion Windows</a>

# Ensure no Prospects slip through the cracks

Working	Sold On	<input type="text" value="4/11/2022"/>	[ 5/20/2024 ]
Net	Net On	<input type="text" value="4/14/2022"/>	[ 5/20/2024 ]
Paid In Full	Paid in Full On	<input type="text" value="5/20/2022"/>	[ 5/20/2024 ]
Final	Final On	<input type="text" value="5/22/2022"/>	[ 5/20/2024 ]

Completed Date	Completed Reason ↑
4/29/2024	New Appointment
4/29/2024	New Appointment
2/28/2020	New Marketing Opportunity
6/4/2020	New Marketing Opportunity
7/13/2021	New Marketing Opportunity

Completed Date	<input type="text" value=""/>	[ 5/20/2024 ]
Completed Reason	<input type="text" value="--None--"/>	

1. **Result** ALL Appointments within 24 hours of the Appointment taking place.
2. Enter a **Final On** date on the Sale when all related Projects are Complete and there is no remaining Balance Due.
3. Do not manually enter a **Completed Date** on a Marketing Opportunity. The system populates Completed Date and Completed Reason based on User action within the system.

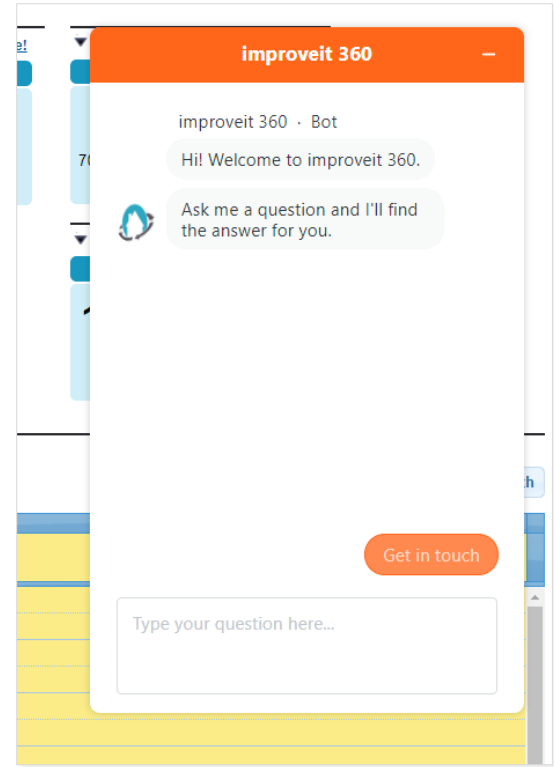


# How to Reach Us

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



Thanks  
for Attending



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