Marketing Plans Guide

11/10/2014 Blackbaud Direct Marketing 4.0 Marketing Plans US

MKTPlans-2014

Contents

Marketing Plans and Templates

Marketing plans are your estimates for costs and marketing efforts for the next year (or another set time period). Only after your marketing plan is finalized, and the budget approved, will you start to create the items in the plan, such as strategies, campaigns, funds, or appeals. Ultimately you will need to map corresponding items in your marketing plan and your source data to each other, but this will not occur as part of creating your plan. The Planner feature provides a “scratch pad” for you to work out all aspects of your marketing efforts.

Because marketing plans are based on templates, before creating your marketing plan you must create at least one template on which to base your plan.

About Marketing Plans

When you create a marketing plan, you specify the template from which it will be based. The template is then copied and stored with the marketing plan. This determines the number of “levels” associated with a marketing plan. For example, your template may have a top level you call a “campaign.” The bottom two levels of a plan are always “Planned appeal” and “Planned marketing efforts.”

Any changes you later make to a template do not affect any marketing plans that were based on that template. You can change the color scheme of a particular marketing plan after the plan has been created, but the number of levels cannot be edited.

There are three goals for a marketing plan:

- Map out the marketing efforts that will occur during the year (or a given time period).
- Arrive at and approve a budget for these marketing efforts.
- Produce a Selection Brief for each marketing effort. This Selection Brief outlines the who and what of a marketing effort. It details which segments need to be created (who) and which package people in those segments should receive (what).

Marketing Plan Workflow

To create a marketing plan, first you need a plan template. A template enables you to build a hierarchy of items such as campaigns or programs (you determine the name of these items) and color code them for easy recognition of your plans. The bottom two levels of a template are always “Planned appeal” and “Planned marketing effort.” Then you can create a plan based on the template and add the items specified in the template hierarchy.

You also include “assumptions” for projected budget and revenue for the items, as well as selection briefs to describe who should be included in the various segments of an appeal (or otherwise named item).

Overview: Add a template

This is an overview of how to add a plan template.

1. From the Marketing plans page, click **Plan templates** under **Configuration**.
2. Under **Tasks**, click **Add a marketing plan template**. The Add Marketing Plan Template screen appears.
    a. Enter a descriptive name.
    b. The level is a summary/category/grouping of items to make it easy to organize your plans into a hierarchy.
    c. In the **Caption** field, enter the names your organization uses for the levels in your hierarchy. You pick a **Color** scheme which uses a different gradient of the color for each level to help you identify an item’s type at a glance in the plan.
3. Click **Save** and the template appears in the list.

   Now that your template is done, you are ready to create an actual plan. From *Marketing and Communications*, click **Marketing plans** to get started.

Overview: Add a plan

This is an overview of how to add a plan. For a more detailed explanation, refer to Add Marketing Plans on page 8.

1. From *Marketing and Communications*, click **Marketing plans**. The Marketing plans page appears.
2. Click **Add a marketing plan**.
3. On the Add marketing plan screen, select the template that you just made or any others you may have made previously. If you specified that the template you just made be the default (or if it is your only template) its properties automatically populate the plan.
    a. **Code** is a source code, something that allows you to mark and identify this plan.
    b. **Goals** describes what you are trying to accomplish for the entire plan.
    c. The **Start Date** is required so that it will appear on the Planner calendar. Even if you are not sure of the start date now, enter a date. You can change the start date at any time if necessary.
    d. The **End Date** is optional and can be entered at any time, even after the plan has been completed.
    e. Click **Save**.

       With the basic plan properties defined, you can begin adding hierarchy items to the plan.

Overview: Add plan items such as appeals and marketing efforts

This is an overview of how to add a plan item. For a more detailed explanation, refer to Appeals, Marketing Efforts, and Other Plan Items on page 15.

1. To begin defining the first level of the plan, click **Go to {highest level defined in the plan}**.

Note: If the template you based the plan on contains only Planned Appeal and Planned Marketing Effort levels, **Go to appeal** is available instead of **Go to {highest level defined in the plan}**.

2. The page for the top level item appears. On this page, you describe your budgeting and revenue goals to help move the plan forward. You can then use these goals to define tasks on the Tasks tab and costs on the Expenses tab. You can also attach files to the plan item. Attachments can be any type of file that helps with this plan item, from meeting notes to a quote from a vendor for materials related to the marketing effort being performed.
   a. Click the **Edit assumptions** task to enter estimates for budget, revenue, and quantity target amounts; response rate; and number of responses.
   b. Use the tabs on the page to add and edit estimated Expenses, Tasks, and Attachments that relate to this item.
   c. The List tab lists any second level items in the hierarchy. When you click **Add**, the Add {second level item in the hierarchy} screen appears.
   d. Repeat these steps for all items in your hierarchy.
3. When you add Planned Marketing Efforts (the lowest level of the hierarchy), additional tabs are available for you to add Segment Summaries and Specifications.
   a. On the Segment Summaries tab you can supply information that will eventually be translated into Segments. You can associate each item in the summary with a Package and various assumptions (as with the other plan items). This tab also includes a grid containing a summary of the package usage including total quantity and total budget amount.
   b. On the Specifications tab you can enter high level notes about the marketing effort. Each note can be placed in a specific category you define and can be given a title. This information is used in reports.

Overview: Approve the plan

This is an overview of approving a plan. For a more detailed explanation, refer to Approve and Unapprove Plans on page 11.

1. After all the stakeholders agree on the final plan and all its items, open the plan and select **Edit approval status**. The Edit approval status screen appears.
2. Select the **This strategy is approved** checkbox.
3. Each planned marketing effort in a plan appears in the Marketing Efforts tab on the Marketing Effort page. You can create a marketing effort from each of these entries in the grid. When you do, the Segments grid in each marketing effort is automatically populated with all the Segment Summaries from the plan. These summaries enable you to group segments together so their values “roll up” into each other.

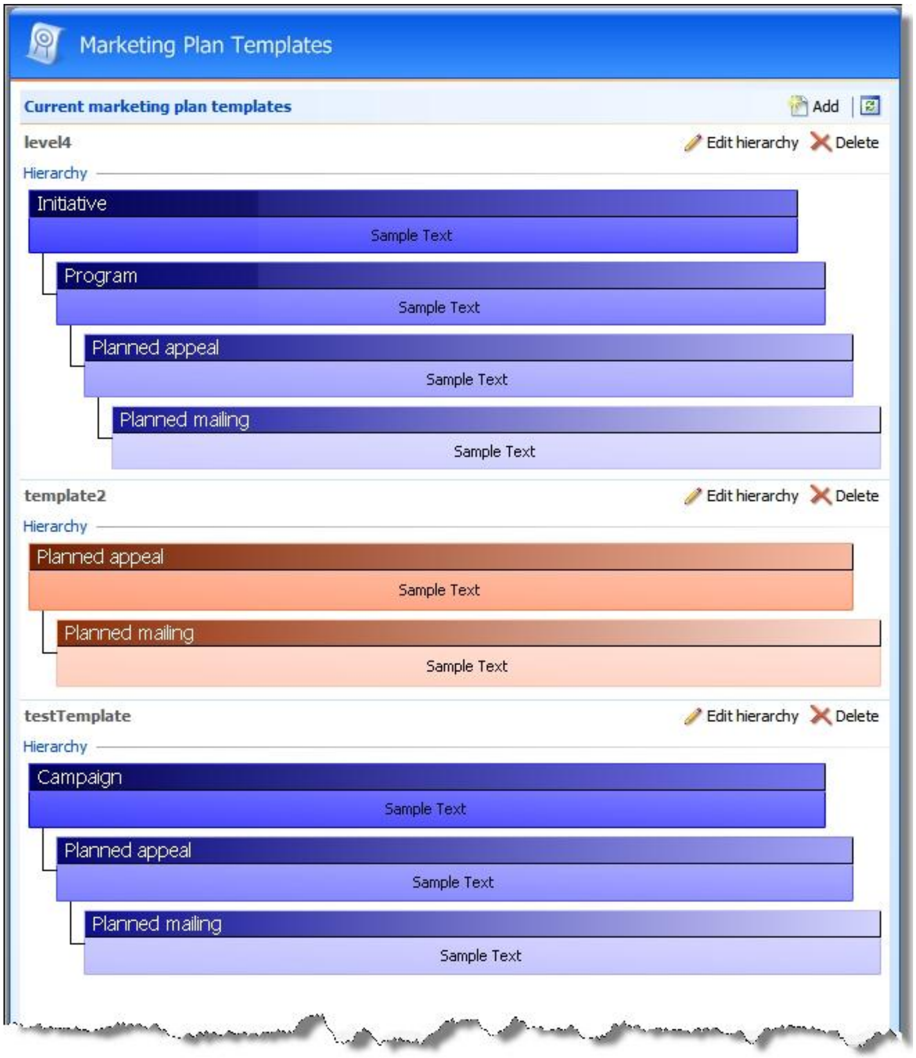
Overview: Analyze expectations vs. actual results for the plan

After approving a plan, create actual marketing efforts from the planned marketing efforts in the plan. You can then use the Plan Status report to compare expectations vs. actual results for planned marketing efforts.

1. From *Marketing and Communications*, click **Direct and public marketing**. The Direct and public marketing page appears. Create efforts from the planned marketing efforts in your approved plan.
2. From the Marketing plan, run the Plan Status report to compare the expectations in the plan with the actual results of the marketing efforts. .

Marketing Plan Templates

Different organizations have different reporting needs when they plan their marketing activities. Some may send out several appeals during the year and report on overall performance; others may arrange appeals under campaigns so they can create campaign reports to summarize various appeals. Others may place campaigns under an umbrella category. To help meet your needs, you can use marketing plan templates to create a reporting hierarchy up to five levels deep and assign a custom name to the top three levels (the bottom two levels are always “Planned appeals” and “Planned marketing efforts”). All templates appear on the Marketing Plan Templates page. To access the Marketing Plan Templates page, from the Marketing Plans page, click **Plan templates** under **Configuration**.



From this page, you can add and manage marketing plan templates as necessary.

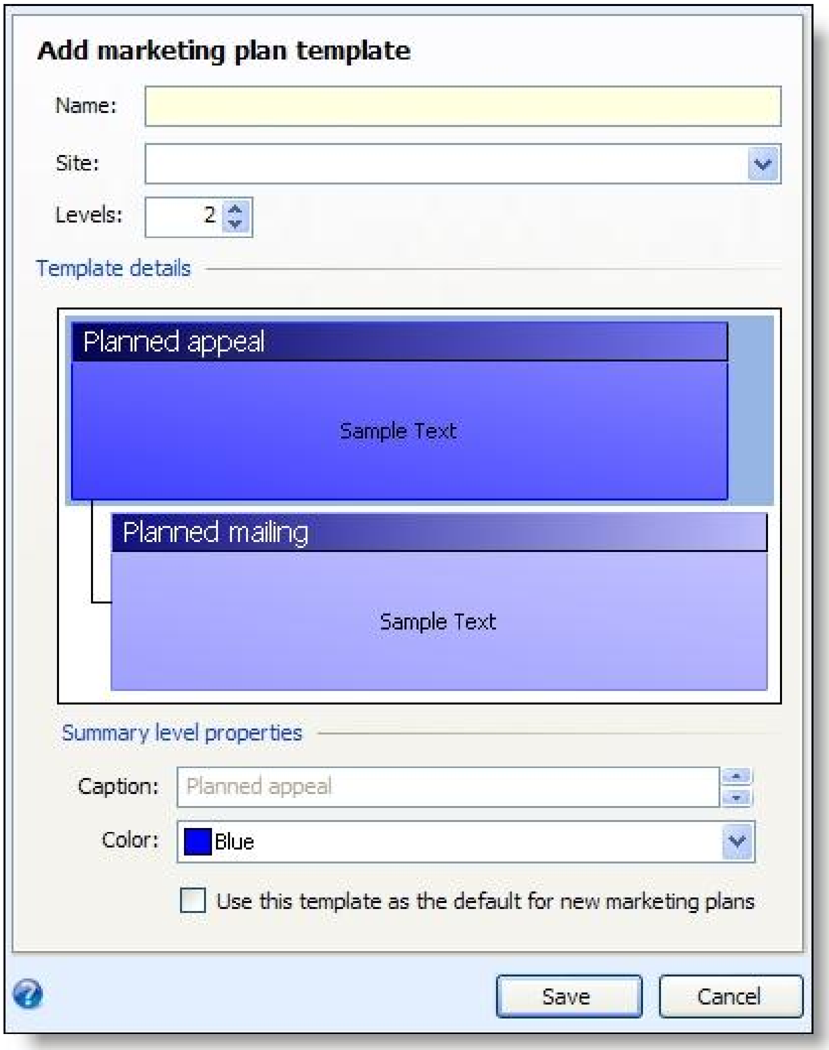
Add Marketing Plan Templates

You can define as many marketing plan templates as you need. For example, you may need two; one to support your hierarchy, and another for one-off appeals.

When you add a template, you specify its number of levels with a minimum of two (planned appeals and planned marketing efforts) and a maximum of five. You select a color and a different gradient of the color displays each level of the plan. When you add levels, you specify a name. Level names do not have to be unique, but doing so helps ease data entry and reporting. Template names must be unique.

Add a marketing plan template

1. From the Marketing Plans page, click **Plan templates** under **Configuration**. The Marketing Plan Templates page appears.
2. On the action bar, click **Add**. The Add marketing plan screen appears. For information about the items on this screen, refer to Add Marketing Plan Template Screen on page 7.



3. Enter a unique name to help identify the template.
4. To restrict use of the template to a specific site at your organization, in the **Site** field, select the site to use the template.
5. In the **Levels** field, enter the number of levels to include in the template hierarchy. The template can include two to five levels.
6. Under **Template details**, the template hierarchy appears, based on the number of levels entered. Select each level and, in the **Caption** field, enter the name of the level, such as Strategies, Campaigns, or Funds. You cannot edit the caption for the Planned appeal or Planned marketing effort level.
7. In the **Color** field, select the color scheme for the template. Each level appears as a different gradient of the selected color.
8. To use this template as the default when users create a marketing plan, select **Use this template as the default for new marketing plans**.
9. Click **Save** to save the hierarchy.

Add Marketing Plan Template Screen

The table below explains the items on this screen.

Screen Item	Description
Name	Enter the name of the new template. No two templates can have the same name.
Site	System administrators can establish security access to marketing plan templates based on site. When you select a site in the **Site** field, only users associated with the selected site can access the marketing plan template.
Levels	Specify the number of levels in this template. The minimum is two and maximum is five.
Template details	As you add or remove levels to the template, or specify colors or caption names for levels, your changes appear here.
Caption	The Planned appeal and Planned marketing efforts levels default in and are locked. For any other level you add, select it in the **Template details** box and enter a name for it. You can use Strategies, Projects, Campaigns, Funds, or any other name your organization uses for items in the hierarchy. Although you can give different levels the same name, we recommend you do not to make your reports easier to analyze later.
Color	Select a color scheme for the template. A different gradient of the color is used to display each level of items in the plan.
Use this template as the default for new marketing plans	Select this checkbox if you want this template to default into the **Template** field when users create a new marketing plan. This is only a default and users can change the template on the new plan if necessary.

Edit a Marketing Plan Template

You can edit the hierarchy and other properties of an existing template. When you edit a template, you do not affect marketing plans already based on the template. Changes you make to the template only affect future plans based on that template.

Edit a marketing plan template

1. From *the Marketing Plans page*, click **Plan templates** under **Configuration**. The Marketing Plan Templates page appears.
2. Select the template to edit and click **Edit Hierarchy**. The Edit Marketing Plan Template screen appears. The items on this screen are the same as those available when you add a plan template. For more information, refer to Add Marketing Plan Template Screen on page 7.
3. Edit the information as necessary.
4. Click **Save** to save your changes to the template.

Delete Marketing Plan Templates

You can delete existing plan templates. When you delete a template, you do not affect current plans based on the template. If you delete the default template, no template defaults in when you add a new plan.

Delete a marketing plan template

1. From *the Marketing Plans page*, click **Plan templates** under **Configuration**. The Marketing Plan Templates page appears.
2. Select the template to delete and click **Delete**. A message appears to ask whether to delete the template.
3. Click **Yes**. You return to the Marketing Plan Templates page. The template no longer appears, and user can no longer base a plan on the template.

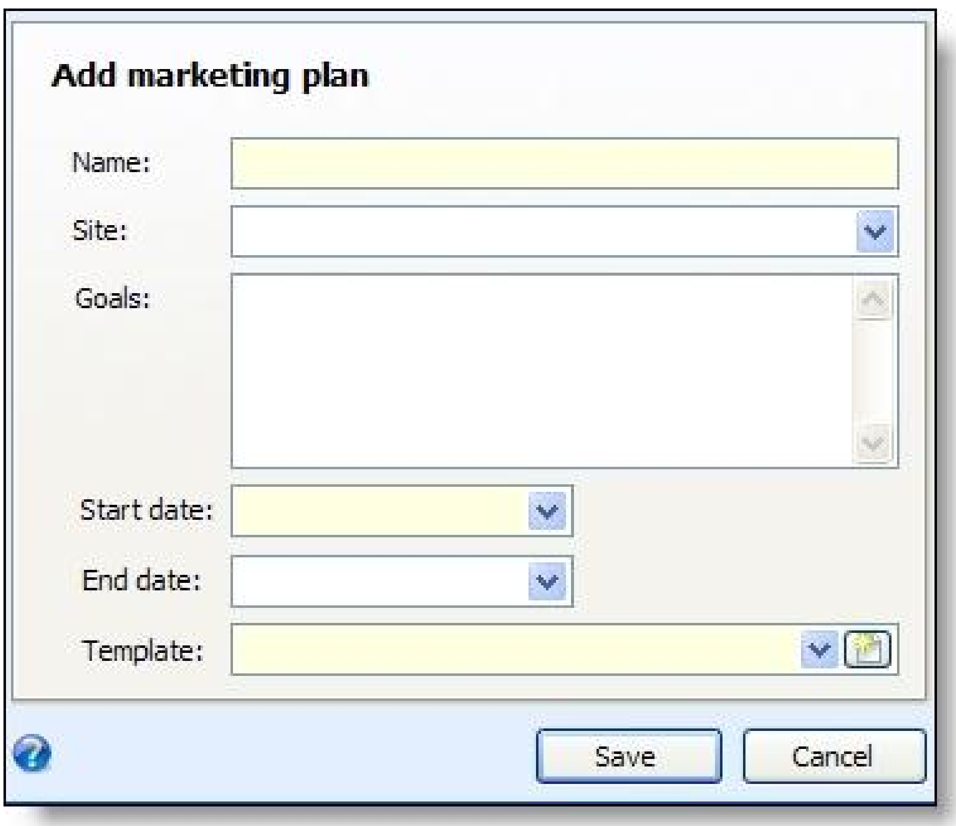
Add Marketing Plans

Before you add a marketing plan, you must have created at least one marketing plan template on which the plan will be based.

When you create a plan, you specify a name, code, and start date for it. Additionally, you can specify an end date and include a text description of your goals for the plan. After specifying this information, you can add appeals, marketing efforts, and other items to the plan.

Add a marketing plan

1. From *Marketing and Communications*, click **Marketing plans**.
2. On the Marketing plans page, click **Add a marketing plan**. The Add marketing plan screen appears.



3. On this screen, you enter basic information about the plan. For detailed information about the items on this screen, refer to Add Marketing Plan Screen on page 9.

4. Click **Save** to save the plan.

Add Marketing Plan Screen

The table below explains the items on this screen.

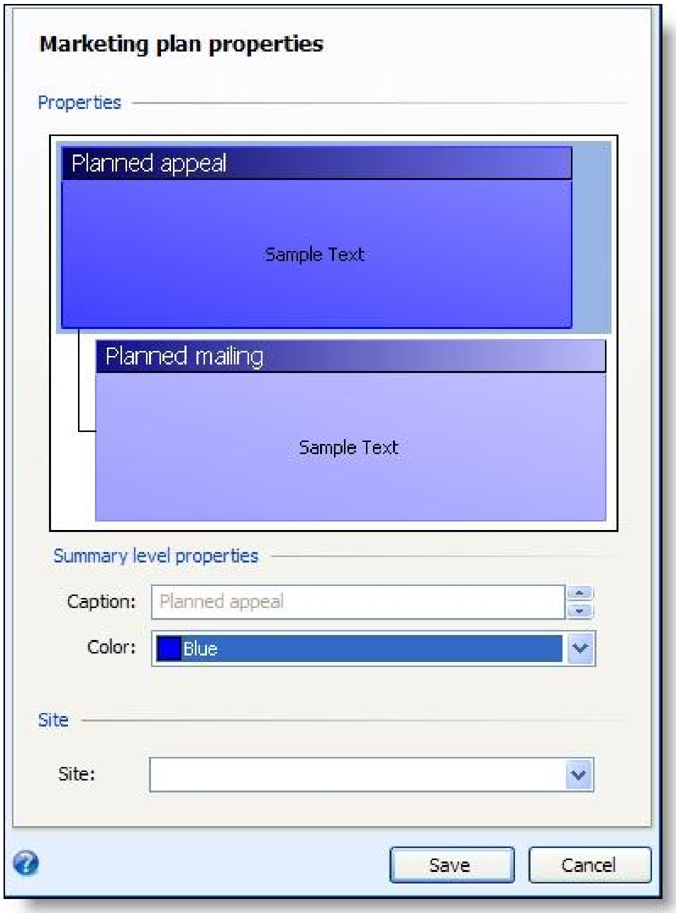
Screen Item	Description
Name	Enter a name for the plan that is descriptive enough to easily identify the plan in other items such as reports and queries.
Site	System administrators can establish security access to marketing plans based on site. When you select a site in the **Site** field, only users associated with the selected site can access the marketing plan.
Goals	Text description of your goals for this plan. For example, "To acquire 10K new donors through a series of three appeals."
Start Date	Date the plan will start. You can change this at any point.
End Date	An End Date is not required, but entering one enables you to use date ranges in your reports and analyses.
Template	Select the template on which you want to base this marketing plan.

Edit Plan Properties

You can edit basic information on an existing plan.

Edit marketing plan properties

1. From a plan record, click the **Edit plan properties** task. The Marketing plan properties screen appears.



2. You can rename the **Caption** for any level you named (the Planned appeal and Planned marketing effort levels are named by the program and locked).
3. You change the **Color** used to display the marketing plan.
4. System administrators can establish security access to marketing plan properties based on site. When you select a site in the **Site** field, only users associated with the selected site can access the marketing plan properties.
5. Click **Save** to save your changes.

Delete Plans

Deleting a plan has no impact on any marketing efforts that may already be associated with it. The Segment Summary groups no longer appear in the **Segmentation** grid on the marketing effort, but the segment sequence and everything else is preserved.

▸ **Delete a marketing plan**

1. From the Planner page, select a plan and click **Delete**. A message appears verifying that you want to delete the plan.
2. Click **Yes**.
3. The plan no longer appears on the page.

Approve and Unapprove Plans

Approving a plan signifies that you are ready to create marketing efforts based on it. Each planned effort in a plan appears in the Planned Marketing Efforts grid on the main Marketing Efforts page of the program. You can create an effort from each of these entries in the grid. When you do, the Segments grid in each effort is automatically populated with all the Segment Summaries from the plan. These summaries enable you to group segments together so their values "roll up" into each other.

You can also unapprove a previously approved plan. When you unapprove a plan, any marketing efforts previously generated from that plan are not affected.

Approve a marketing plan

1. From the Planner page, select a plan and click **Approve**. The Edit Approval Status screen appears.

2. Select the **This {plan} is approved** checkbox and enter the name of the approver and date on which the plan is approved.
3. Click **Save**. The plans status shows that it is now approved.

Unapprove a marketing plan

1. From the Planner page, select an approved plan and click **Unapprove**. The Edit Approval Status screen appears.
2. Unselect the **This {plan} is approved** checkbox and enter the name of the approver and date on which the plan is approved.
3. Click **Save**. The plans status shows that it is now unapproved.

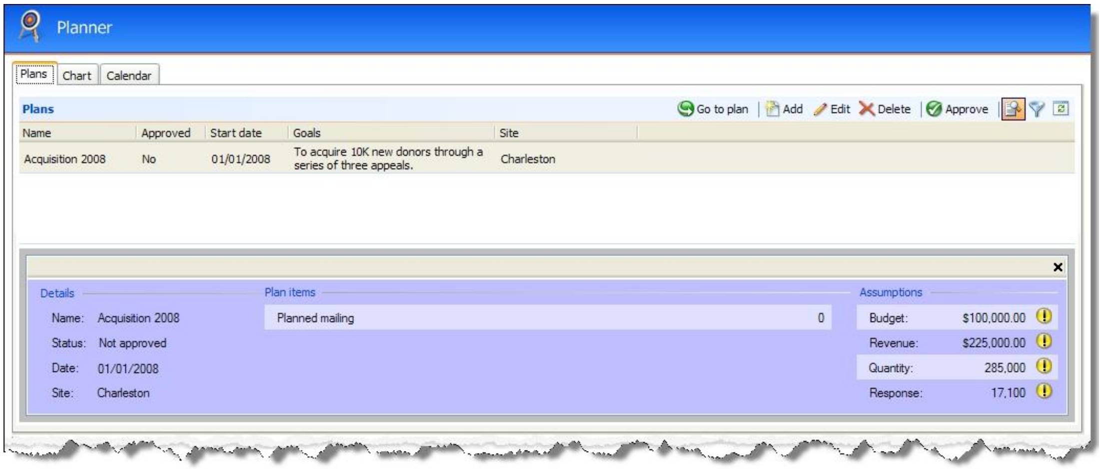
Planner Page

The Planner page lists all the plans you create. You can add a new plan or manage your plan templates from this page.

From this page, you can also chart the progress of your plans and use calendar to add and view tasks for plans.

View All Plans

The Plans tab shows at a glance all your plans including their detail information and budget and revenue assumptions. You can also access any plan's record from here to edit assumptions, detail information, and more.



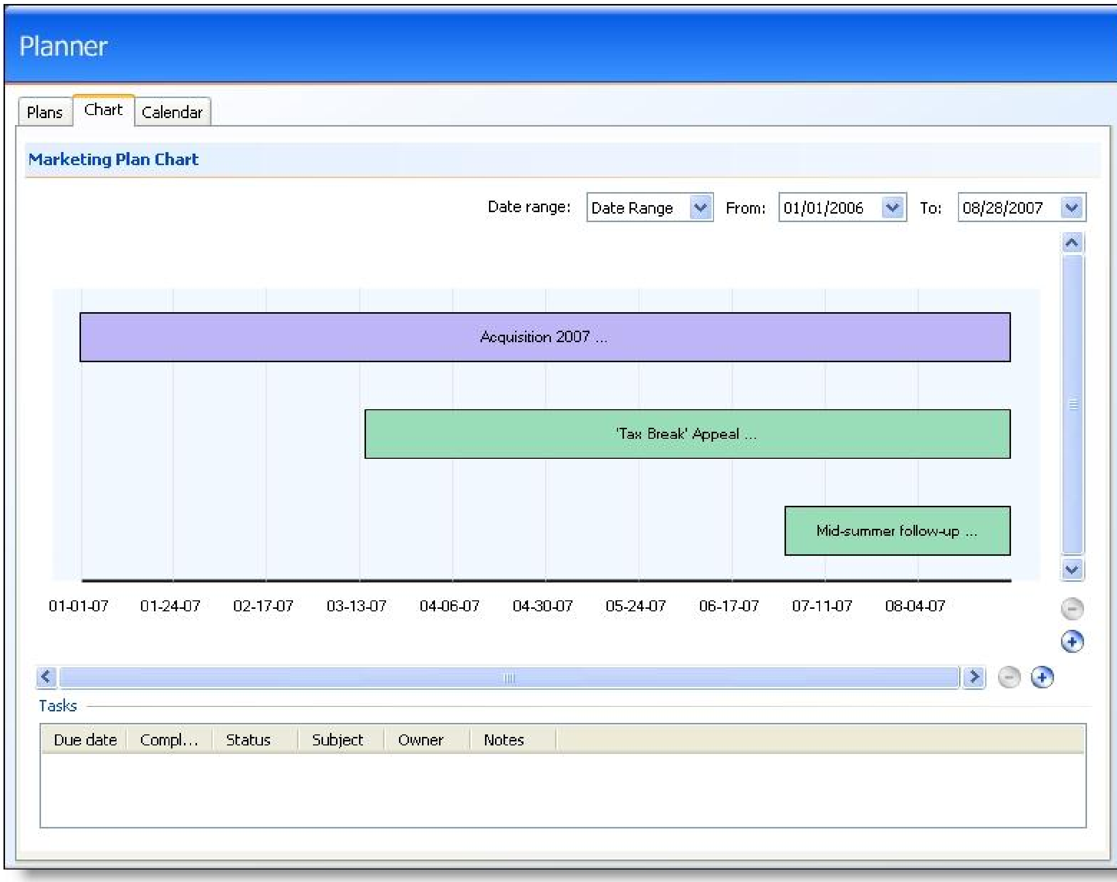
When you select a plan, detail information for that plan appears at the bottom of the page. This information cannot be edited from the **Details** section of this page. To edit information, click **Go to** to access the plan itself.

The **Plan items** box lists a total count of the number of items in the plan, by type. These map directly to the plan hierarchy.

The **Assumptions** box displays the high level assumptions for the plan, with an indicator of whether or not the assumption has been balanced. A red X indicates the you have over allocated relative to your assumption and a yellow exclamation point indicates that you still have to balance the assumptions to the allocations. A green check indicates that the plan's allocations are equal to its assumptions.

View Timelines on the Chart Tab

The Chart tab enables you to see at a glance which plan items overlap in time. You can click an item to open it and make any necessary adjustments.

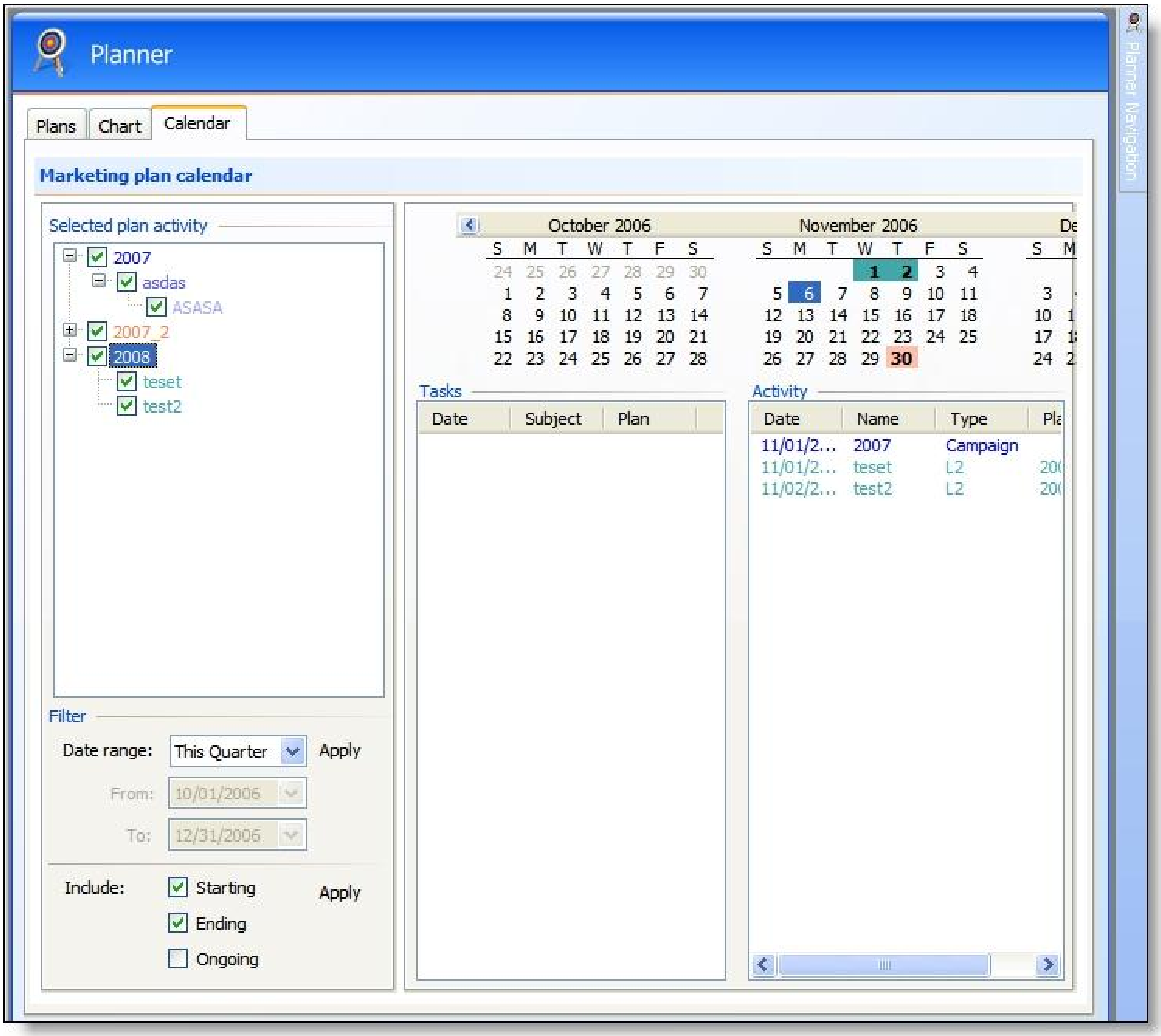


Enter the **Date range** for which you want to view your plan items.

Tasks for a selected item appear at the bottom of the page and you can right-click on one to edit or delete it. You can also add tasks for a selected item here.

Manage Tasks on the Calendar Tab

The Calendar Tab displays a calendar on which tasks assigned to any of your plans display. You can add tasks either from a plan record or directly from this calendar.



The **Selected Plan Activity** box lists your marketing plans and the items in those plans. You can mark or unmark checkboxes by plans or by individual items in plans to specify that they appear in the calendar.

In the **Filter** frame, select a **Date range** for the items that you want to display in the calendar. You must click **Apply** for a change in the selected date range to appear in the calendar.

Mark checkboxes to specify whether only items with a **Starting** date, an **Ending** date, or that are **Ongoing** to appear in the calendar. You must click **Apply** for any changes here to be reflected in the calendar.

You can right-click on a date or in the **Tasks** box to add a task. If a selected date already contains a task, you can edit or delete it from here.

For a selected month in the calendar, the **Activity** box lists all items for which you marked checkboxes in the **Selected Plan Activity** box.

Appeals, Marketing Efforts, and Other Plan Items

Marketing plan items are anything that maps to a given level in the plan hierarchy; these are your planned appeals, planned marketing efforts, and whatever else you specified in the plan or template properties.

From the Planner page, when you highlight a plan and select **Go to {highest level defined in the plan}**, the page for the plan appears.

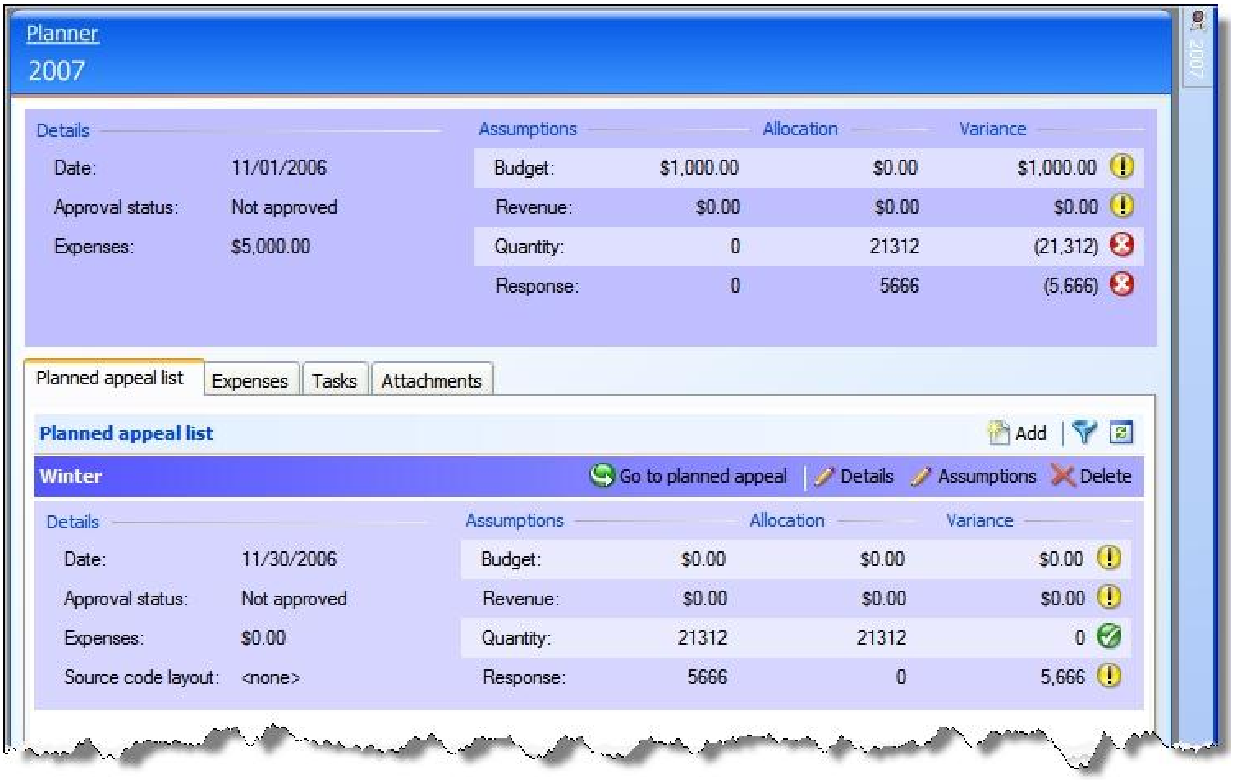
Items in the hierarchy all include the List, Expenses, Tasks, and Attachments tab.

Planned marketing efforts (the lowest level of the hierarchy) also include the Segment Summary and Specifications tabs. On the Segment Summary tab, you write text descriptions of the groups of people included in your segments. On the Specifications tab, you describe who should be included in a marketing effort; for example, you may note that constituents with no valid address be globally excluded.

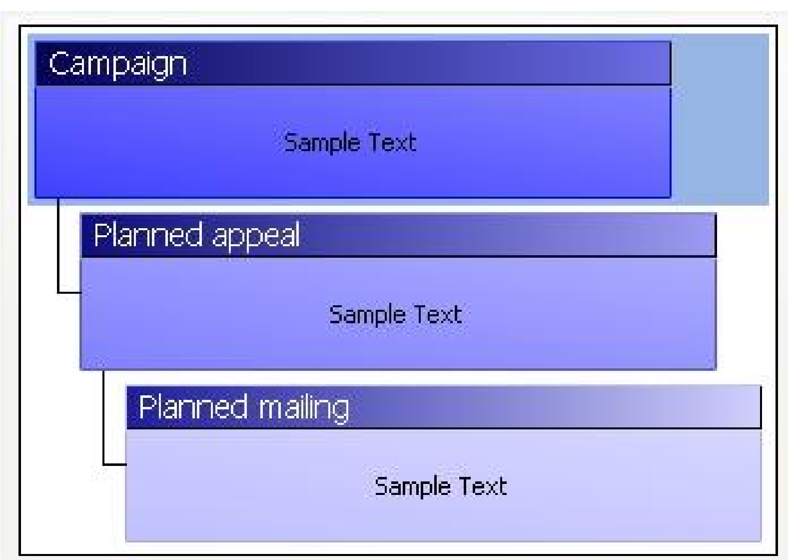
Add Marketing Efforts, Appeals, and Other Plan Items

All marketing plans by default contain levels for Planned appeals and Planned marketing efforts. If necessary, you can name and define three additional levels for your plans. Once you create a plan, you can add items to all levels of it. When viewing a given level of items in a plan (for example Planned appeals), the List tab includes all items in the next lower level in the hierarchy (in this case Planned marketing efforts, which are always the lowest level items in a plan hierarchy).

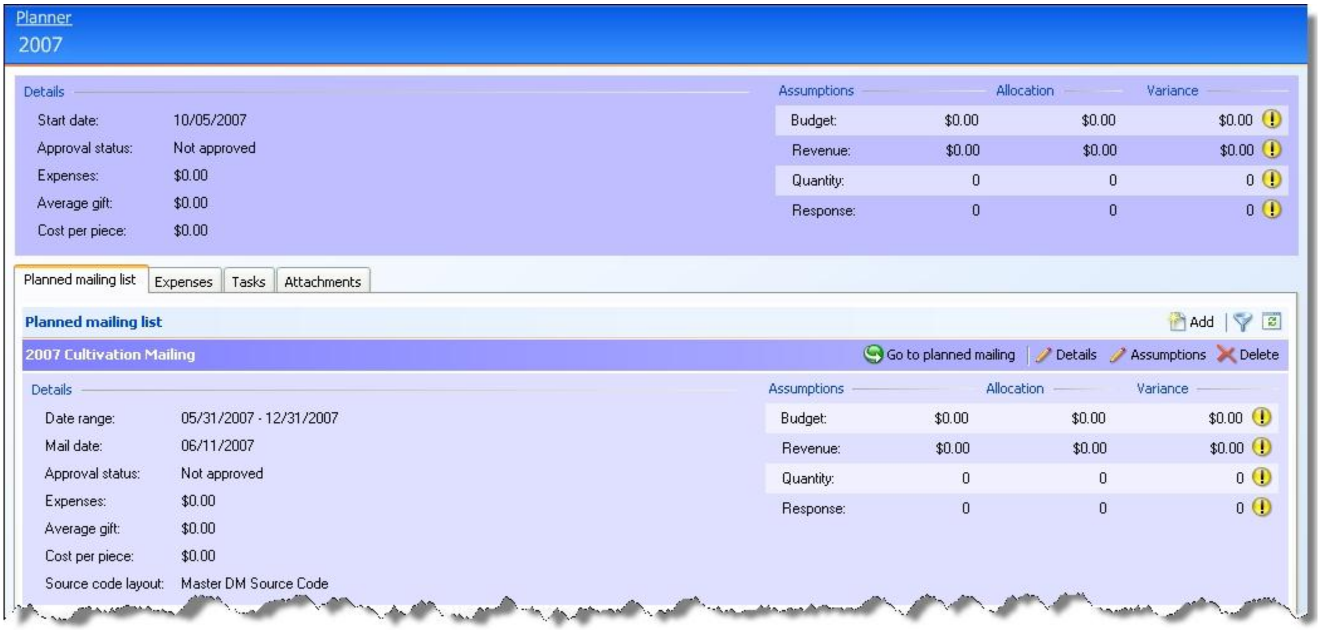
The top of the page displays detail and summary information for the current level of the plan. To learn more about entering and editing this information, refer to Assumptions on page 20.



When viewing an item in a plan, the List tab includes all items in the next level in the hierarchy. For example, in the below hierarchy, when viewing the Campaign page of the plan, the List tab would be available to view and define appeals for the campaign.

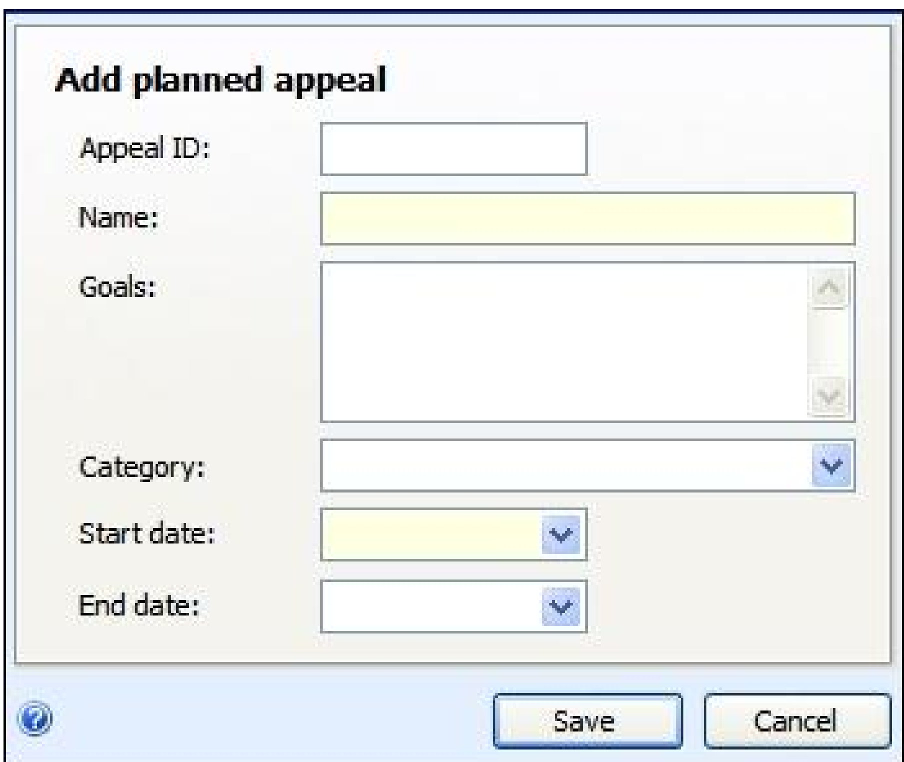


In any plan, when viewing a specific appeal, the List tab is available to view and define mailings for that appeal.



Add a planned appeal or other marketing plan item

1. From the List tab, click **Add**. The Add a [selected item] screen appears.



2. On this screen you define the details for the selected plan item. For information about the items on this screen, refer to Add Plan Item Screen on page 18.
3. Click **Save**, you return to the Planned marketing effort tab where the new item now appears.

Add Plan Item Screen

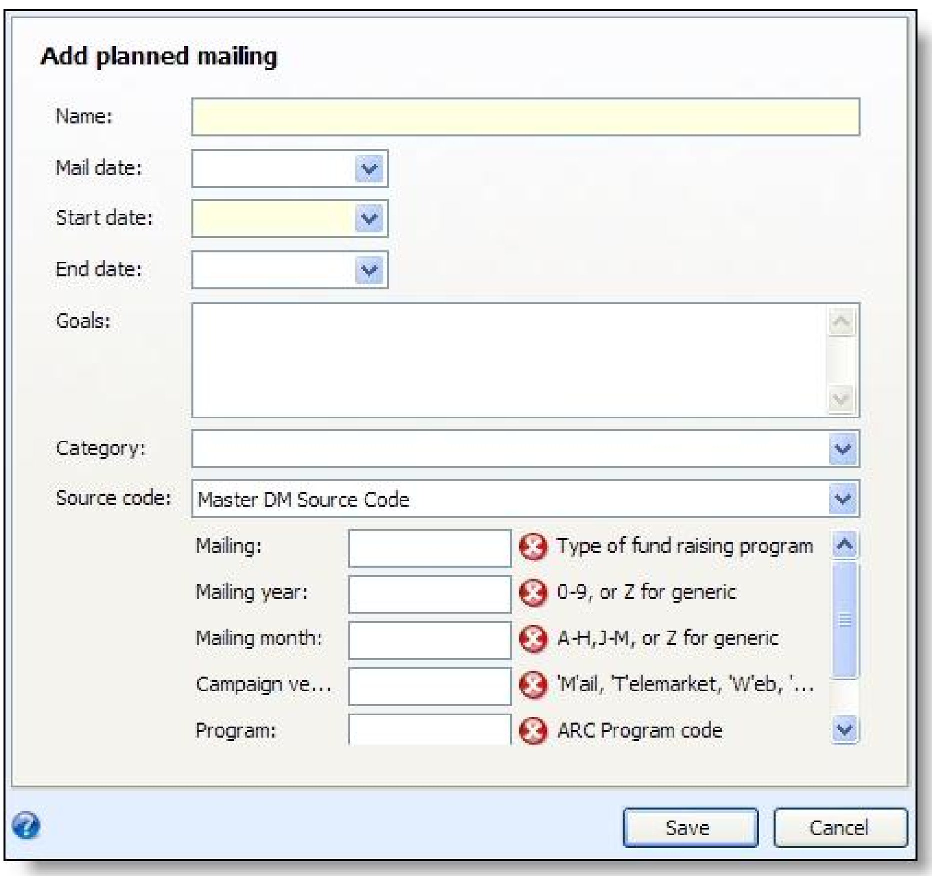
Except for planned appeals, the name of the actual plan item being added is dependant upon what you named it in the template on which the plan is based, or in the plan properties.

The table below explains the items on this screen.

Screen Item	Description
Appeal ID	The Appeal ID field is available only when adding Planned appeals. An entry is not required, but if you do enter an ID, the ID and Name are used as defaults when you activate the marketing effort.
Name	Enter a name for the appeal or other plan item that is descriptive enough to easily identify it in reports and queries.
Goals	You can enter a text description of your goals for this plan item. For example, “To generate 50,000 new members.”
Category	A category is not required, but you can use it to group your plan items.
Start Date	A Start Date is required for a plan item.
End Date	End Date is not required, but including one enables you to specify a date range for the item.

Add a planned marketing effort

1. From the List tab of an appeal in a marketing plan, click **Add**. The Add a marketing effort screen appears.



2. On this screen you define the details for the planned marketing effort. For information about the items on this screen, refer to Add a Planned Marketing Effort Screen on page 19.
3. Click **Save**, you return to the List tab where the new planned marketing effort now appears.

Add a Planned Marketing Effort Screen

The table below explains the items on this screen.

Screen Item	Description
Name	Enter a name for the marketing effort that is descriptive enough to easily identify it in reports and queries.
Mail Date	A Mail Date is the date the marketing effort is actually sent to the post office. The Mail Date can be different from the Start Date. A Mail Date is not required.
Start Date	A Start Date is required for a marketing effort.
End Date	End Date is not required, but including one enables you to specify a date range for the marketing effort.
Goals	You can enter a text description of your goals for this planned marketing effort
Category	A category is not required, but you can use it to group your marketing efforts.
Source code	Select a code layout for the marketing effort. Layouts are created on the Source Codes page. Once you select a source code, the component fields for that particular code appear. These fields vary depending on which layout you selected. A valid entry in each of these fields is required before you can save the marketing effort.

Edit Marketing Plan Items

You can edit the properties of a plan item at any time. The name of the actual plan item depends on what you named it in the template on which the plan is based, or in the plan properties.

Edit details for a plan item

1. From a plan item's page, click **Edit details**. The Edit {selected item} screen appears.
2. On this screen you edit the details for the selected plan item. The items on this screen are the same as those on the Add a plan item screen. For more information about this screen, refer to Add Plan Item Screen on page 18. If you are editing a planned marketing effort, refer to Add a Planned Marketing Effort Screen on page 19.
3. Click **Save**, your changes now appear on the selected plan item's page.

Delete Marketing Plan Items

Deleting a plan item has no major effect on marketing efforts created from that item. For example, if you delete a planned marketing effort, the only impact on an actual marketing effort created from it is that the **Go to plan** link is no longer available, and the Segment Summaries no longer appear in the marketing effort.

If you delete a marketing effort that was based on a plan, then that plan will appear in the bottom grid of the Segmentation Page (where the **Create marketing effort from plan** option is available).

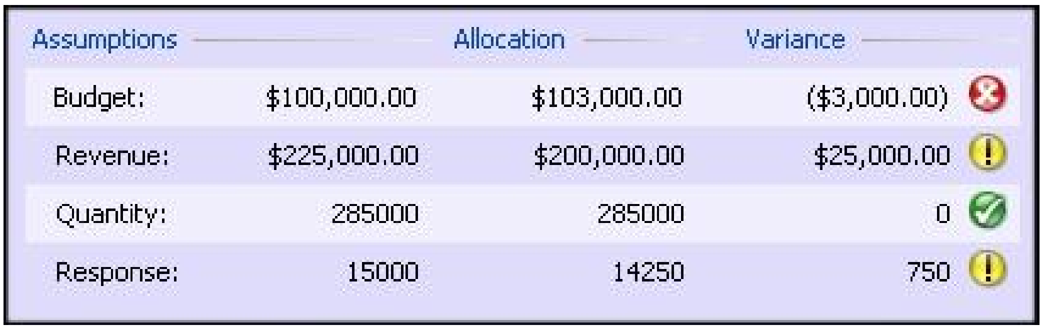
Delete a plan item

1. Select a plan item and click **Delete**. A message appears verifying that you want to delete the item.

2. Click **Yes**.
3. The plan item no longer appears in the plan.

Assumptions

An assumption is your best guess at your goal for a particular measure. An allocation is the sum of that measure on the lower items in the hierarchy. The Variance is the difference between the two. For each level in the hierarchy, the program tracks Assumptions, Allocations, and Variance between the two numbers for the Budget Amount, Expected Revenue, Expected Quantity and Expected Responses.



Assumptions		Allocation	Variance
Budget:	$100,000.00	$103,000.00	($3,000.00)
Revenue:	$225,000.00	$200,000.00	$25,000.00
Quantity:	285000	285000	0
Response:	15000	14250	750

Icons indicate whether there is a direct match between the assumed and allocated amounts, or whether a variance is positive or negative.

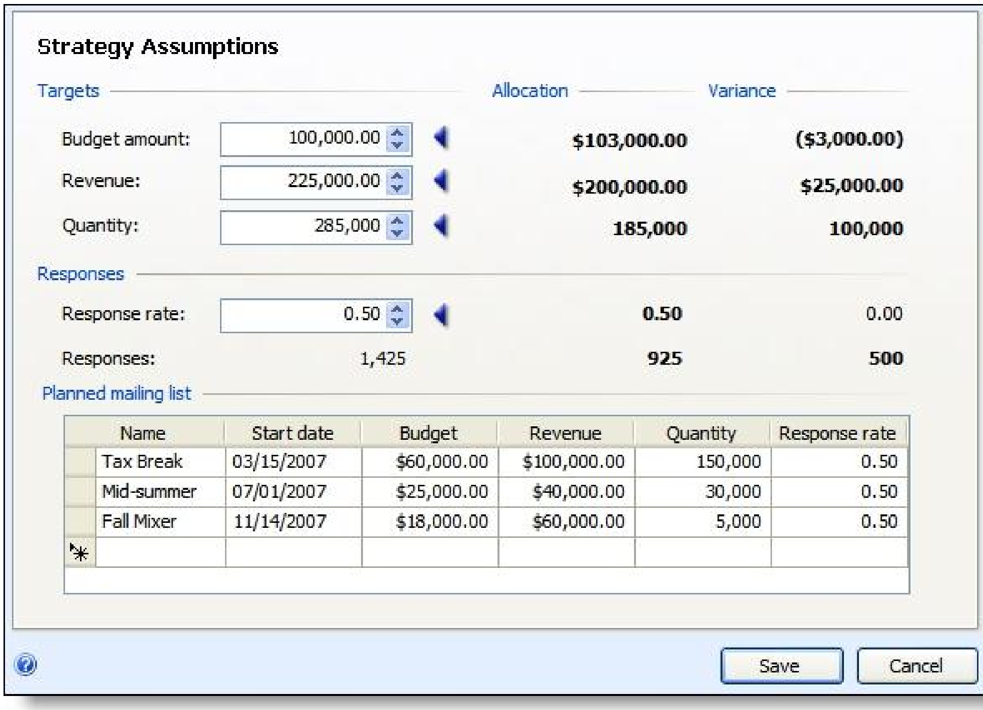
For a higher level item in the hierarchy, you can break down assumptions by the number of items below that item. For example, if your hierarchy contains a top level of “Strategy” with “Planned appeals” directly below it, you can list the assumption amounts for your Strategy by each Appeal. For planned marketing efforts, you can break down by segment.

As an example, say you are establishing the Budget Amount for a Campaign/Appeal hierarchy. For the campaign, you set the Budget Amount assumption at $10,000.

You then add three appeals, each with its own Budget Amount; $5,000, $3,000 and $1,000. You are allocating portions of the $10,000 assumed campaign budget to the appeals. For this campaign, your Budget Amount Assumption is $10,000, the Budget Amount Allocation is $9,000 ($5,000+$3,000+$1,000); therefore, the Budget Amount Variance is $1000 ($10,000-$9,000).

▸ **Add or edit marketing plan item assumptions**

1. From a selected hierarchy item page, select the **Edit assumptions** task. The Assumptions screen for that item appears.



2. On this screen you define your best guesses for various properties (budget, revenue, response rate, etc.) for the selected item in the plan hierarchy. For information about the items on this screen, see Assumptions Screen on page 21.
3. When you click the Blue Arrow beside an assumption, the program copies the Allocated amount into the corresponding assumption and calculates the variance.

   Quantity, Response Rate and Responses are linked:

   - Changing the Quantity updates the Responses based on the Response Rate (Responses = Quantity x Response Rate)
   - Changing the Response Rate updates the Responses, based on the Quantity (Responses = Quantity x Response Rate)
4. The grid at the bottom of the screen show all the items at the next level of the plan. Totals for Budget, Revenue, Quantity, and Response rate up into the totals at the top of the screen. You can add a new item to the grid and doing so creates a record for that item in the plan. To roll up any amounts you update in the grid, click the blue arrows beside a field above the grid.
5. Click **Save**. You return to the selected item where your assumptions now appear.

Assumptions Screen

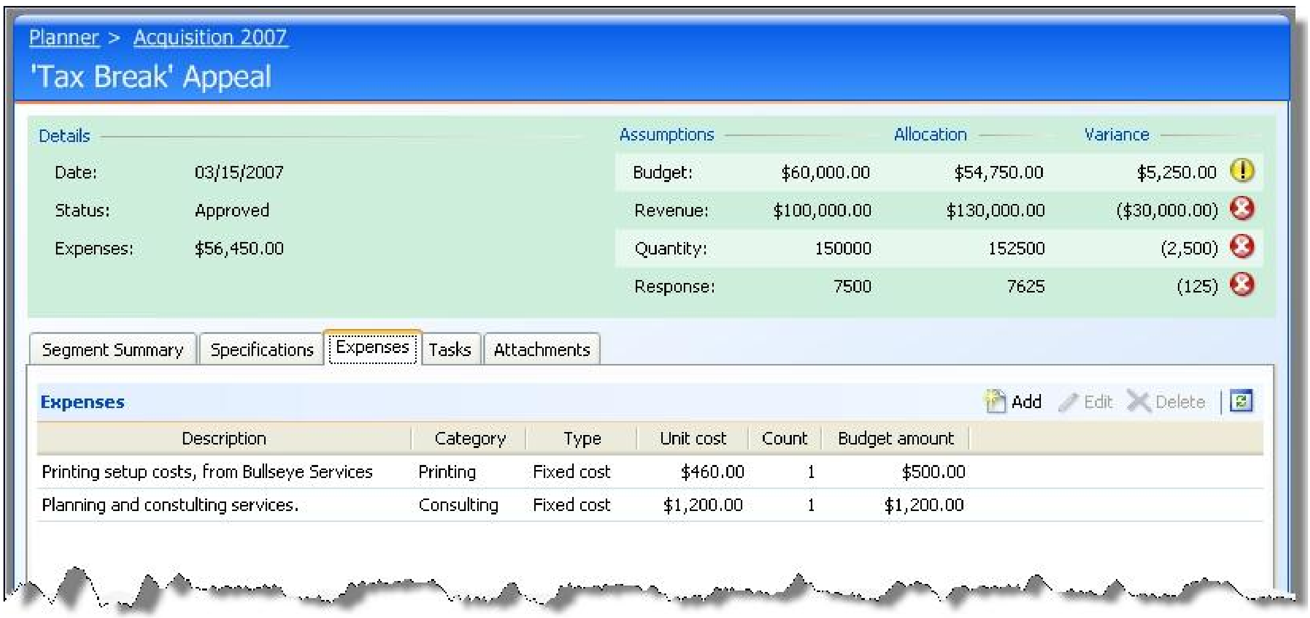
The table below explains the items on this screen.

Screen Item	Description
"Blue Arrow"	When you click the Blue Arrow beside an assumption, the program copies the Allocated amount into the corresponding assumption and calculates the variance. Quantity, Response Rate and Responses are linked. -Changing the Quantity updates the Responses based on the Response Rate

Screen Item	Description
	(Responses = Quantity x Response Rate) -Changing the Response Rate updates the Responses, based on the Quantity (Responses = Quantity x Response Rate)
Budget	The amount you allocated for this item.
Revenue	The amount you expect this item to bring in.
Quantity	The number of pieces of you expect to send for this item.
Package Description	(Available only in Segmentation assumptions) Select the marketing effort piece that should be sent to this segment
Package Cost	(Available only in Segmentation assumptions) Enter the cost of each piece of mail to be sent to this segment
Package Quantity	(Available only in Segmentation assumptions) Enter the number of people you expect to be in this segment.
Response rate	The percentage of responses you expect for this item
Responses	The number of responses you expect for this item
List Grid	This grid displays items at the next level of the plan. If the currently selected item is a Planned marketing effort, the grid displays a list of segment summaries.

Add Expenses

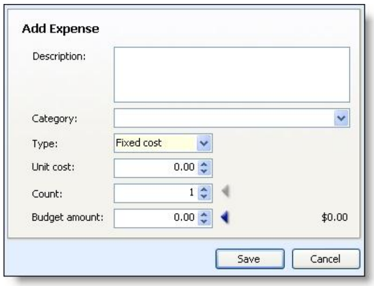
Expenses are the costs you incur to implement a marketing effort. At each level in the plan you can enter expenses. The program totals these expenses and they display in the Details section of the plan summary page.



There are three types of expenses: Fixed cost, Per piece, and Per response. Fore more information and examples, see Add Expense Screen on page 23.

Add an expense

1. From the Expenses tab, click **Add**. The Add an expense screen appears.



2. On this screen you define the expense. For information about the items on this screen and the different types of expenses, refer to Add Expense Screen on page 23.
3. Click **Save**. You return to the Expenses tab where your new expense now appears.

Add Expense Screen

The table below explains the items on this screen.

Screen Item	Description
Description	Provide a description the expense that will help you identify it on pages and reports.
Category	Enter the grouping in which you want to include the expense. For example, your organization may have categories for “Consulting” or “Printing.”
Type	An entry in this field is required. There are three types of expenses: **Fixed cost** - The budget amount is calculated as (fixed cost x count). **Per Piece** - It is assumed that you will be sending one of these items for each person in the marketing effort so the budget amount calculation uses the Quantity from the parent item (the item above this one in the hierarchy). The base calculation is (Quantity / Number per Unit) * Cost. If there is a remainder from the (Quantity / Number per unit) calculation, then the Cost is added to the calculation again to account for that portion. The final total is multiplied by Units. Example: You need envelopes for a 1000 piece upcoming marketing effort. You buy the envelopes by the box of 30, at a cost of $2.00 per box. Assumed Quantity = 1000 Number Per Unit = 30 Cost = $2.00 The Count (total number) of boxes required will be 34; 1000 / 33, rounded up. The Budget Amount will be 34 * $2.00, or $68.00 **Per Response** - This is a cost incurred as the result of a response to the marketing effort. The program uses the **Assumed Response** number from the parent item in the calculation. The calculation matches the calculation used for **Per Piece**, with Responses replacing Quantity.
Unit Cost	Cost per each piece of the marketing effort
Count	Number of pieces included in the marketing effort
Budget Amount	The amount you have allotted for this expense. This amount will be calculated against the information you entered above to determine whether or not the budgeted amount is sufficient to meet the expense.

Edit Expenses

You can change or update information about an expense at any time.

Edit an expense

1. Select an expense and click **Edit**. The Edit expense screen appears.
2. On this screen you can make the necessary changes to the expense. The items on this screen are the same as when you add an expense. For more information, refer to Add Expense Screen on page 23.
3. Click **Save** to save your changes.

Delete Expenses

When you delete an expense for a marketing plan, the amount of the expense is no longer included in the **Details** section of the plan's summary view.

Delete an expense

1. Select an expense and click **Delete**. A message appears verifying that you want to delete the expense.
2. Click **Yes** to delete the expense.

Add Tasks

Tasks are actions you define that can be associated with any plan item. For example you could have a task to call a vendor. After you add a task, it appears on the Calendar tab on the Planner page. Tasks can be added and edited from either the Tasks tab on an item, or through the Calendar and Chart tabs on the main Planner page.

Add a task

1. From the Tasks tab, click **Add**. The Add a task screen appears.

2. On this screen you define the task. For information about the items on this screen, see Add a Task Screen on page 25.
3. Click **Save**. You return to the Expenses tab where your new expense now appears.

Add a Task Screen

The table below explains the items on this screen.

Screen Item	Description
Task is for	The currently selected plan item defaults into this field.
Subject	Specify what that task is. This information will appear in the calendar and various other areas. You can include additional information about the task in the **Notes** box.
Status	Enter whether the task is active or completed.
Due Date	Enter the date on which the task must be completed by.
Completed	If you entered a status of completed, this field is enabled for you to enter the date the task was completed.
Owner	You can enter the person responsible for completing the task.
Notes	Enter any additional information you want to capture about the task.

Edit Tasks

You can change or update information about a task at any time.

Edit a task

1. Select a task and click **Edit**. The Edit task screen appears.
2. On this screen you can make the necessary changes to the task. The items on this screen are the same as when you add a task. For more information, refer to Add a Task Screen on page 25.
3. Click **Save** to save your changes.

Delete Tasks

You can delete tasks for marketing plan items.

Delete a task

1. Select a task and click **Delete**. A message appears verifying that you want to delete the task.
2. Click **Yes** to delete the task.

Mark Tasks Complete

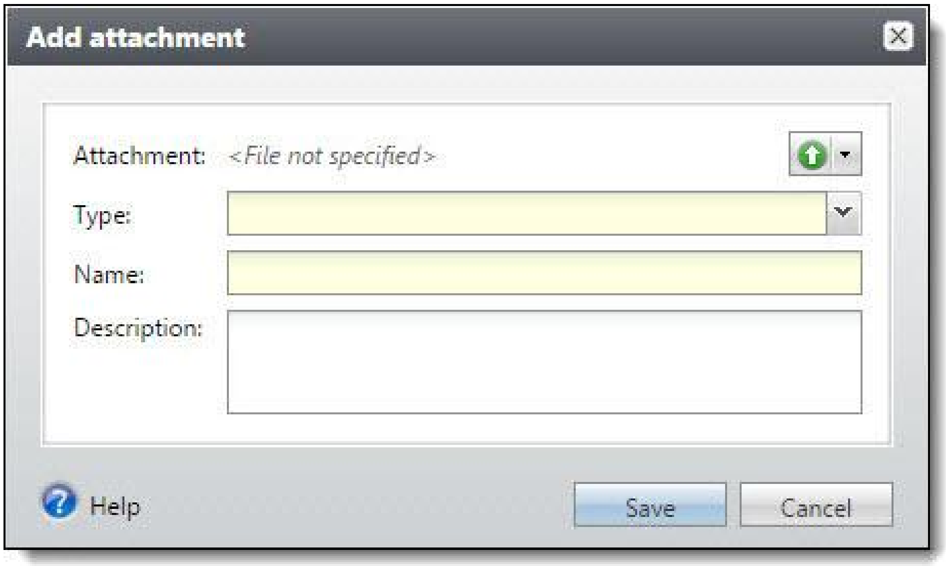
You can flag tasks when they are completed.

Add Attachments

The Attachments feature enables you to associate digital assets with a marketing plan item. You can associate any type of file with a plan item so it can be retrieved for later reference. For example, you may want to associate a particular graphic with a plan item.

▸ Add an attachment

1. From the Attachments tab, click **Add**. The Add an attachment screen appears.



2. On this screen you define information for the attachment and browse to the file you want to attach. For information about the items on this screen, refer to Add an Attachment Screen on page 26.
3. Click **Save**. You return to the Attachments tab where your new attachment now appears.

Add an Attachment Screen

The table below explains the items on this screen.

Screen Item	Description
Attachment type	Select the type of attachment you are adding. For example, a contract or expense worksheet. Click the field name to add additional table entries if you have proper security rights. Table entries for any field should be set up in *Configuration* to maintain data entry consistency
Name	Enter a name that will enable you to easily identify the attachment.
Description	You can enter additional text to help you identify the attachment.
Attach File	Click the paperclip to map to the location of the file on your network. Click **Open**. You return to the Add attachment screen. The address or file name now appears in the field.
Open File	Once you attach a file, you can click **Open File** to open the file for viewing.
Clear File	Once you attach a file, you can click **Clear File** to delete the file and start over.

Edit Attachments

After you add an attachment, you can edit it if necessary.

▸ Edit an attachment

1. From the Attachments tab, select an attachment and click **Edit**. The Edit an attachment screen appears.

2. On this screen you can edit the attachment properties and specify a different file for the attachment. The items on this screen are the same as those on the Add an attachment screen. For information, refer to Add an Attachment Screen on page 26.
3. Click **Save**. You return to the Attachments tab where the edited attachment now appears.

Delete Attachments

Deleting an attachment removes it from the record of a marketing plan item.

Delete an attachment

1. Select an attachment and click **Delete**. A message appears verifying that you want to delete the attachment.
2. Click **Yes** to delete the attachment.

Open Attachment Files

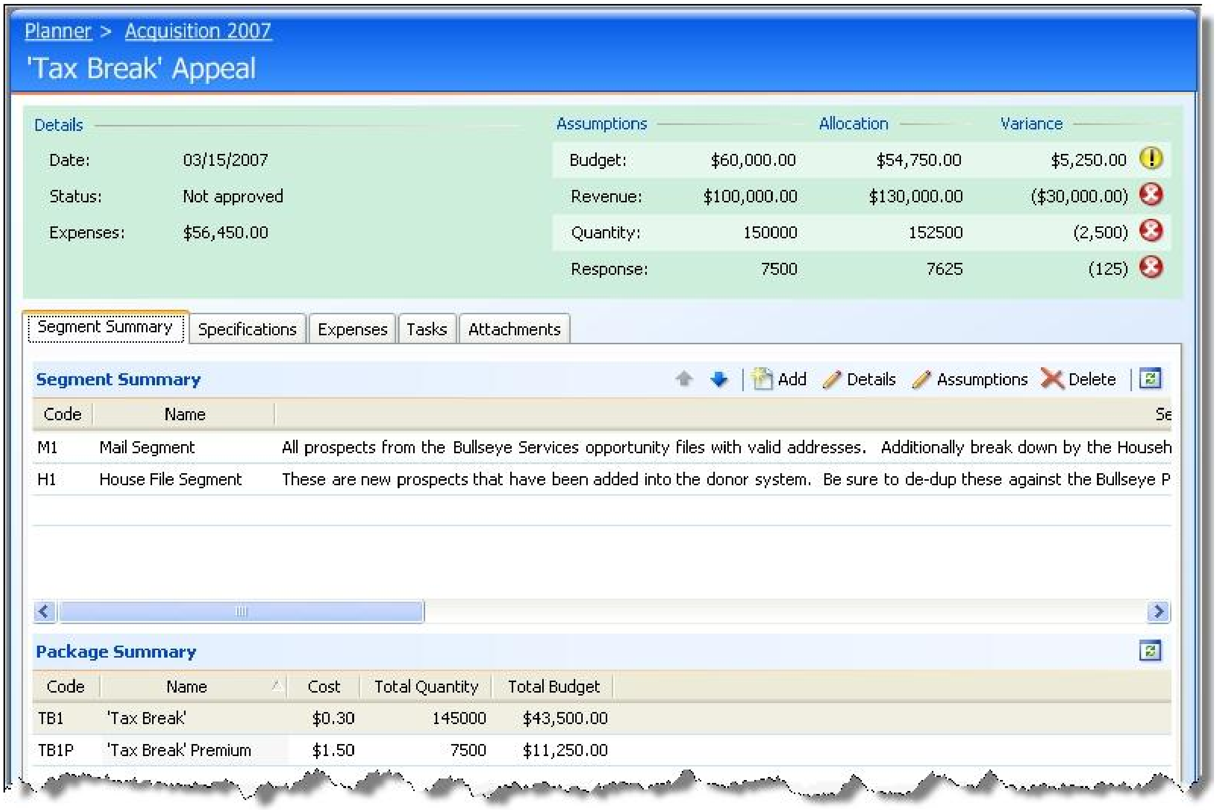
You can open and view a file associated with an attachment.

Open an attachment file

1. Select an attachment and click **Open file**.
2. The file opens on your computer for viewing purposes.

Add Segment Summaries

The Segment Summary tab displays information about the segments that make up a planned marketing effort.



The Package Summary frame displays totals for packages entered on segment assumptions. For more information about entering assumptions, refer to Assumptions on page 20.

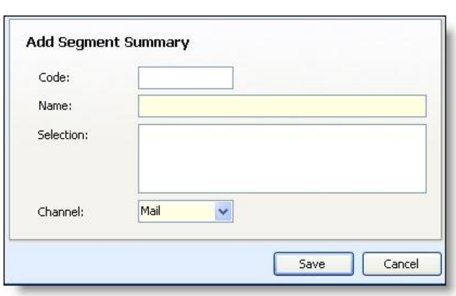
When you create a segment summary, you write a selection that describes the group of people included in the segment. This selection text will be used by your marketing coordinator or other staff to create the queries that determine who will be included in the segment. Provide as much detail as possible to assist the person who will be creating the segment.

For example, a selection could consist of the following “Include all records with valid addresses from the 2007 opportunity file. Do a 5% split test of the records using the new “Tax Break” Premium Package. The rest should get the standard 'Tax Break' package.

When you approve a plan, a marketing effort is created for each planned marketing effort. The Segments grid in each marketing effort is automatically populated with all the segment summaries from the plan. These summaries enable you to group segments together so their values “roll up” into each other.

Add a segment summary

1. From the Segment Summary tab, click **Add**. The Add Segment Summary screen appears.



2. On this screen you define the segment details. For information about the items on this screen, refer to Add Segment Summary Screen on page 29.
3. Click **Save**. You return to the Segment Summary tab where your new expense now appears.

Add Segment Summary Screen

The table below explains the items on this screen.

Screen Item	Description
Code	A code field appears if the source code layout used for the plan includes a part for segments. This code will be combined with other codes from a marketing effort to provide the unique source code for the marketing effort.
Name	Enter a descriptive name to identify the segment.
Selection	Describe the selection of records that will make up this particular segment. This description will be used to create the actual selection that filters the records to create the segment

Edit Segment Summaries

After you add a Segment Summary, you can edit it if necessary.

Edit a segment summary

1. From the Segment Summaries tab, select a summary and click **Details**. The Edit segment summary screen appears.
2. On this screen you can edit the summary information. The items on this screen are the same as those on the Add a Segment Summary screen. For information, refer to Add Segment Summary Screen on page 29.
3. Click **Save**. You return to the Segment Summary tab.

Delete Segment Summaries

You can delete segment summaries so that they do not appear in the marketing effort created from a planned marketing effort.

Delete an attachment

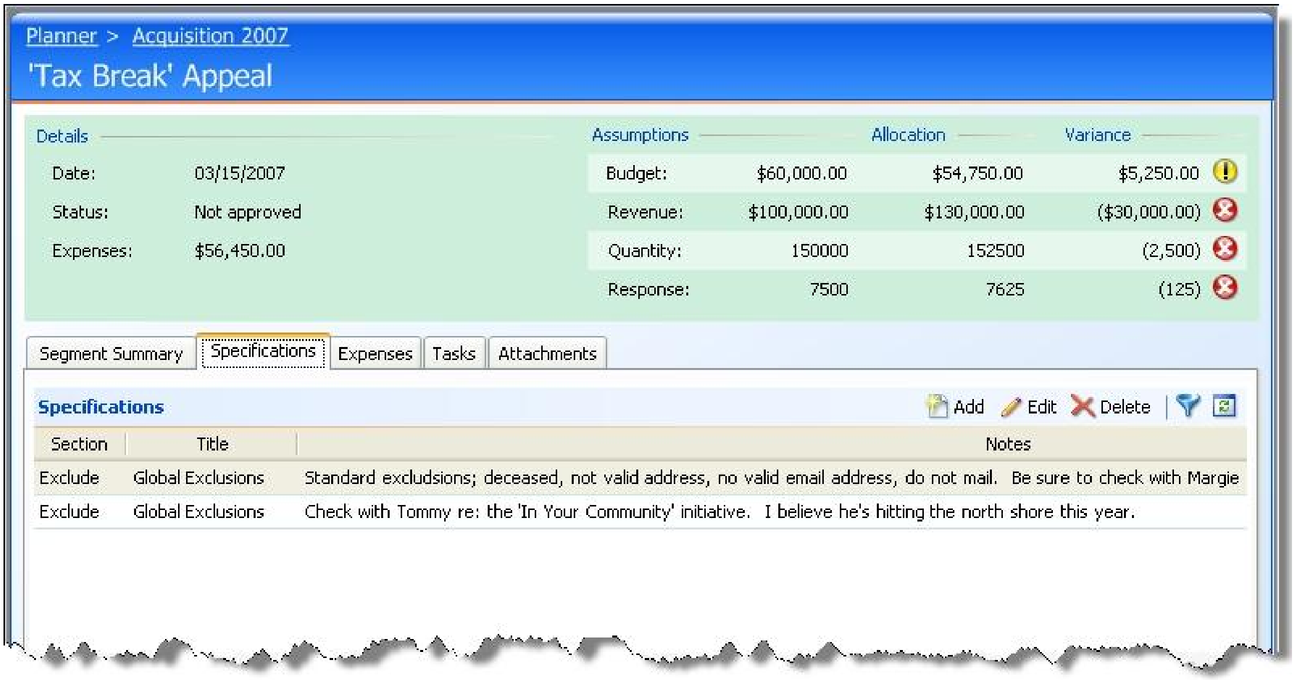
1. From the Segment Summaries tab, select a summary and click **Delete**. A message appears verifying that you want to delete the summary.
2. Click **Yes** to delete the summary.

Move Segment Summaries Up and Down

Use the up and down arrows to rearrange the order of your segment summaries. When you create marketing efforts from the plan, the summaries will default into the marketing efforts in the order you specify here.

Add Specifications

On the Specifications tab, you provide high level notes about the marketing effort. Each note can be placed in a Section, and can be given a Title. Section and Title are used in the Selection Brief report(s).



A specification note describes information about who should be included in a marketing effort. For example, you may have a global exclusion note similar to the following: “Standard exclusions; deceased, not valid address, no valid email address, do not mail. Be sure to check with Margie with Major Gifts to see if she has any new exclusions.”

Add a specification

1. From the Specifications tab, click **Add**. The Add a specification screen appears.

2. On this screen you define the details for the specification. For information about the items on this screen, refer to Add a Specification Screen on page 30.
3. Click **Save**. You return to the Specifications tab where your new expense now appears.

Add a Specification Screen

The table below explains the items on this screen.

Screen Item	Description
Section	Specify where the specification belongs; for example, inclusion or exclusion. Section types are values from the Marketing Plan Item Specification Code table in *Administration*. Specifications with a section type of “Universe” or

Screen Item	Description
	"Include" appear on the Universe tab of the marketing plans's marketing effort. Specifications with a section type of "Exclude" appear on the Exclusions tab of the marketing effort.
Title	Enter a title for this specification. The title is used in the Selection Brief report.
Notes	Enter detailed notes that will be used to specify who should receive the marketing effort created from this plan.

Edit Specifications

After you add a specification, you can edit it if necessary.

Edit a specification

1. From the Specifications tab, select a spec and click **Edit**. The Edit specification screen appears.
2. On this screen you edit the segment details. The items on this screen are the same as when you add a specification. For information, refer to Add a Specification Screen on page 30.
3. Click **Save**. You return to the Specifications tab.

Delete Specifications

You can delete a specification so that it is not included in the marketing effort created from a planned marketing effort.

Delete a specification

1. From the Specifications tab, select a spec and click **Delete**. A message appears verifying that you want to delete the specification.
2. Click **Yes** to delete it.